



317-498-7801



mdeem@baderco.com



October 2015

• MARCIA • DEEM •

Marketing Coordinator

CTSM

**CANDIDATE
PORTFOLIO**

Table of Contents

SECTION 1: Vital Statistics	2
Candidate Profile	2
Company Profile.....	3
SECTION 2: Overview	4
Special Circumstances.....	4
SECTION 3: Show Schedule/Measurable Show Objectives	5
Show Objectives.....	5
Show Strategies and Tactics.....	6
Trade Show Schedule	7
SECTION 4: Management of Exhibit Design/Production	8
Management Planning.....	8
Exhibit Design	8
Production Strategies.....	11
Booth Pictures.....	14
Budget vs. Actuals	17
SECTION 5: Management of Integrated Marketing Communications	18
Planning, Goals and Results	18
Association Partnerships/Sponsorship	19
Pre and Post Show Email Blasts.....	21
At-Show.....	22
Booth Staff.....	23
SECTION 6: Management of Results Reporting	24
Results.....	24
Reporting Results.....	25
SECTION 7: Conclusion	26
SECTION 8: REFERENCES	27
SECTION 9: APPENDIX	28

SECTION 1: Vital Statistics

Candidate Profile



I've always been a planner. From parties, to trips, to my own destination wedding on a budget. I enjoy the whole process from beginning to end. I like to think of the possibilities and make them a reality. Even the budgeting part, although I try to avoid spreadsheets as much as I can!

I first started working with conferences and trade shows when I was still in college. I lived in Brazil, where I'm from originally, and worked as a bilingual hostess – Portuguese/English – at many events.

In the end of 2002, I graduated with a Bachelor's Degree in Communications and Advertising and moved to the United States in 2004. I was reintroduced to the world of trade shows while I was working as an assistant for a jewelry designer in 2008. We participated in many small shows, and attended large shows and conferences throughout the country. It was fun and busy, but I still didn't have much knowledge of the industry and was more focused on marketing communications and graphic design.

In February 2013, I started working for Bader Company as a Marketing Coordinator, my current position as I write this portfolio. One of my job requirements is to help coordinate events and trade shows. I was with the company for not even two months when I attended my first Exhibitors Conference. The size of the show was overwhelming and the number of people working in the industry was impressive. It was a great experience and it made me even more excited about my new position.

As a Marketing Coordinator in a small company I wear many different hats. I am usually involved in many projects within the Sales and Marketing Department, I coordinate our marketing campaigns, create and manage our deliverables and have the responsibility of making sure our branding and messages are consistent. I interact daily with the VP of Sales & Marketing, the Client Development Director (Former Marketing Director and my direct supervisor), the Sales Support Coordinator, the two Account Managers and one Account Executive. We lost four members of our team this year due to cutbacks in our company so, more than ever, each member is crucial for the success of our trade show program.

My director was very supportive when I decided to pursue the CTSM certification. He had also attended the Exhibitor show a few times and had taken many classes; we were able to implement many different concepts we picked up from the sessions.

SECTION 1: Vital Statistics

Company Profile

Bader Company is a national specialty insurance provider located in Indianapolis, Indiana. Our focus is in self-storage, renter's property, multi-family liability and commercial insurance.

The company became a prominent name in the self-storage industry starting in 1995, when it was still known as Bob Bader Company. It soon grew to be a national leader in point-of-lease insurance and worked to actively underwrite and support the self-storage industry.

To reflect the growth of the company, in late 2004, a new corporate name and logo was adopted and the company became Bader Company. In 2008, Bader became an employee-owned organization (ESOP), with 100% of its shares owned by our now 40 employees. The company went through a rebrand in 2013 and added a tagline to the logo: "*Be Assured*". The idea was that "because we are an ESOP, our people are both empowered and vested to ensure our stakeholders complete satisfaction, That, combined with a purposeful focus on core insurance products across selected markets, we are better able to serve our customers and partners, It's this vested focus that enables complete assurance with our brand, our products and all claims we support."



We are a full service insurance provider, with customer service and claims handled in house. Bader is both a B2B and a B2C company: we deal directly with the storage facility owners and apartment complexes management companies, and they offer our insurance to their tenants/renters. Consequently our marketing efforts are directed to that business audience and we are highly involved in both industries.

For the purpose of this portfolio, I will focus on self-storage, since it generates 92% of our revenue.

Self-storage is an industry that is growing exponentially. According to the National Self-Storage Association (SSA), it grossed \$7.2 Billion in annual revenues in 2014 and it has been the fastest growing segment of the commercial real estate industry over the last 40 years. In 2013, about 9.5% of all American households were renting a self storage unit.

Bader currently has approximately 2,700 active facilities under our portfolio, out of a total of about 50,000 facilities nationwide. Our biggest competitors are other tenant insurance and protection plan providers such as: SBOA, On the Move, Deans & Homer, MiniCo, Extra Space, Public Storage, Safestor, SPP Storage Property Protection and Storsmart.

We have been a pioneer in the business for many years and the exclusive insurance partner of the Self-Storage Association, the only national not-for-profit trade association. Our competition is determined in attaining our share of the market and has been introducing many advantages to their clients. Bader Company is committed in maintaining our position as a leader in the industry and is making many internal changes and investments in technology to continue providing its best-in-class service to all of our clients.

SECTION 2: Overview

Bader Company exhibits in 44 trade shows throughout the year for both the Self Storage and Renters industry. That number changed significantly from 2014 to 2015 after the downsizing of the company in April 2015. Currently, we are more focused on the Self Storage part of the business. **Session 20115 - Selecting the Right Shows: The Critical Decision** came in hand when we had to decide what shows to cut from our program, especially **Step 1: Background Analysis**. Interviewing our Marketing and Sales team, particularly the industry veterans, helped us determine where to exhibit based on our company's overall marketing objectives. We cut 27% of our Trade Show presence, from 62 shows in 2014 to 44 this year.

For 2015 Bader will finish the year attending 7 (seven) trade shows for the Renters Industry and 37 for Self Storage (see Page 7 for Show Schedule). That includes: 1 (one) 20'x20' booth space, 1 (one) 10'x20', 9 (nine) 10'x10' and 33 table top exhibits.

For the purpose of this portfolio, I am focusing on the 2015 SSA (Self Storage Association) Fall Trade Show & Conference, held at the Conference Center at Caesars Palace in Las Vegas, NV on September 8-11, 2015. I selected this event for three main reasons:

- This is one of the biggest shows of the year for the self storage industry, with approximately 2,000 storage professionals attending. 60% of those attendees are owners, operators, investors and managers. They represent all levels of involvement, from industry veterans to newcomers. A large percentage of our high value clients attend this show.
- Bader Company has a large presence at the show; we have a 20'x20' booth space and are also a partner sponsor. From a total of 183 booths, only 9 (nine) companies have 20'x20' booths, the 174 left are 10'x10' spaces.
- We were introducing a new tool to our training program, our Bader U Online Portal, expected to launch by the 4th Quarter of 2015.

Having completed all required CTSM classes prior to this conference gave me the knowledge needed to plan and execute this event with confidence, utilizing measurable goals and having our sales and marketing objectives always in mind.

Special Circumstances

The portfolio requirement that we did not apply at the SSA Fall Show was to create an RFP for a new build. Considering our current budgetary constraints and many changes to our company, we opted to reuse our graphics and rent furniture through the General contractor of the show, Freeman Company. Information on this will be found in Section 4.

SECTION 3: Show Schedule / Measurable Show Objectives

Show Objectives

The SSA (Self Storage Association) Fall Show is one of the biggest annual trade shows for the self storage industry, and the largest for the association. It is traditionally held in the Conference Center at Caesars Palace annually in September.

Bader Company is the exclusive insurance sponsor of the National Self Storage Association, so our presence at the show is very important and expected. A 20'x20' booth space is also included on our Partner Plus Package.

While increasing our book of business is always a very important goal at every trade show we participate in, we also have specific objectives that need to be accomplished at each separate event. Our Sales & Marketing team – consisting of our VP of Sales & Marketing, Client Development Director, Sales Support Coordinator, 2 Account Managers, Account Executive and myself, the Marketing Coordinator – worked together to determine what these would be for the SSA Show.

Based on our corporate goals, we came up with the following:

Main Objectives:

1. Manage and strengthen relationships with top current clients
2. Inform and show clients and prospects how they can increase Tenant Insurance participation with Bader Company
3. Introduce the Bader U Portal and new innovations that we will be rolling out in the 4th Quarter of 2015 and beyond.

Measurable Goals:

Objectives	Measurable Goals
Manage and strengthen relationships with top current clients	<ul style="list-style-type: none"> • Meet with <u>Top 37 Clients</u> • All <u>6 staff members</u> present at the booth
Inform and show clients and prospects how they can increase Tenant Insurance participation with Bader Company	<ul style="list-style-type: none"> • Target <u>20 Lower End of the Spectrum Clients</u> (Less than \$10K Yearly Revenue) • <u>25 New Fresh Leads</u>
Introduce the Bader U Portal and new innovations that we will be rolling out in 4th Quarter 2015 and beyond	<ul style="list-style-type: none"> • Show Bader U Introduction video to at least <u>20 people</u>: clients and/or prospects

SECTION 3:

Show Schedule / Measurable Show Objectives

Show Strategies and Tactics:

Measurable Goals	Show Strategies and Tactics
<ul style="list-style-type: none"> • Meet with Top 37 Clients • Target 20 Lower End of the Spectrum Clients (Less than \$10K Yearly Revenue) 	<ol style="list-style-type: none"> 1. Personal email from VP of Sales & Marketing, Client Development Director, Account Executive and Account Managers to clients and prospects to schedule meetings at the show 2. Private dinner for 100 clients and prospects at Joe's Seafood 3. Tablets for Account Managers and Account Executive loaded with information about the levels of tenant insurance participation and program enhancements/innovations 4. Follow up Email Blast to clients interested in increasing tenant insurance participation
<ul style="list-style-type: none"> • All 6 staff members present at the booth 	<ol style="list-style-type: none"> 1. Team will consist of only 6 people, so it will be especially critical for everyone to be present at the booth. Meetings should be scheduled to happen at the booth or outside of trade show floor time.
<ul style="list-style-type: none"> • 25 New Fresh Leads 	<ol style="list-style-type: none"> 1. Pre-Show Marketing to draw attendees to our booth: <ol style="list-style-type: none"> a) Globe Magazine Ad b) Email Blast to pre-attendee list provided by association 2. At-Show: <ol style="list-style-type: none"> a) Lead retrieval system to capture prospects information. At-show follow-up emails. 3. Post-Show <ol style="list-style-type: none"> a) Leads will be distributed to Account Managers and Account Executive. They will follow up with a personal email or phone call to each contact within 2 weeks after the show.
<ul style="list-style-type: none"> • Show Bader U Introduction video to at least 20 people: clients and/or prospects 	<ol style="list-style-type: none"> 1. Pre-Show Email Blast introducing Bader U and inviting attendees to watch the video and win prizes 2. Classroom setup at the booth, with screen showing Module 1 of Bader U (Introduction) 3. All 3 Modules will also be uploaded to the tablets and shown as requested.

SECTION 3:

Show Schedule / Measurable Show Objectives

Bader Trade Show Schedule - 2015

#	Dept	Exhibit	Conference / Trade Shows	Show Location	City, State	Dates
1	Storage	TT	SSA (Self Storage Association) Ski Workshop	The Summit at Big Sky	Big Sky, MT	19-22 Jan
2	Storage	TT	ALSSA(Alabama) Winter Conference and Trade Show	Barber Sports Museum		18 Feb
3	Storage	10x20	SSA Spring Conference	Gaylord Convention Center	Washington, D.C.	11-13 Mar
4	Storage	TT	VA-SSA Annual Meeting (Virginia)	Gaylord Convention Center	Washington, D.C.	13 Mar
5	Storage	TT	MDSSA (Maryland)	Gaylord Convention Center	Washington, D.C.	13 Mar
6	Renters	TT	GCNKAA (Greater Cincinnati Northern Kentucky Apartments Association)	Receptions Banquet Facility	Fairfield, OH	12 Mar
7	Storage	10x10	ISS Spring Conference (Inside Self Storage)	Paris Hotel & Resort	Las Vegas, NV	7-9 Apr
8	Storage	TT	NJSSA Annual Convention (New Jersey)	Crowne Plaza	Monroe, NJ	14 Apr
9	Renters	10x10	Chicagoland AA (Apartment Association)	Drury Lane Theatre	Oakbrook, IL	14 Apr
10	Storage	TT	NDSSA Annual Conference (North Dakota)	Baymont Inn & Suite	Mandan, ND	21-22 Apr
11	Renters	10x10	TAA Conference (Texas Apartment Association)	Henry B Gonzalez Center	San Antonio, TX	22-25 Apr
12	Storage	TT	INSSA Conference (Indiana)	Hilton Indianapolis Hotel	Indianapolis, IN	23 Apr
13	Storage	TT	AZSA Trade Show (Arizona Storage Association)	Wild Horse Pass Hotel	Chandler, AZ	4-6 May
14	Storage	TT	ORSSA Annual Meeting (Oregon)	Salem Convention Center	Salem, OR	6 May
15	Storage	TT	WASSA Annual Conference and Show (Washington)	Hilton Seattle	Seattle, WA	8 May
16	Storage	TT	COSSA (Colorado)	Inverness Conf. Center	Englewood, CO	13 May
17	Storage	10x10	FSSA Conference & Expo (Florida)	Embassy Suites	Orlando, FL	13-15 May
18	Storage	Lit	West Coast Self-Storage Owners Conference (CSSA)	The Westin Verasa	Napa Valley, CA	13-15 May
19	Storage	TT	SSA-OH Annual Meeting (Ohio)	Embassy Suites Hotel	Columbus, OH	19 May
20	Renters	10x10	NJAA	Atlantic Convention Center	Atlantic City, NJ	19-21 May
21	Storage	TT	KYSSA Annual Meeting (Kentucky)	Hilton Cincinnati Hotel	Florence, KY	20 May
22	Storage	TT	KSSOA Spring Show (Kansas Self Storage Owners Association)	Deer Creek Golf Club	Overland Park, KS	20 May
23	Storage	TT	GLSS Expo (Great Lakes Self Storage Owners)	Doubletree Hotel	Chicago, IL	2 Jun
24	Storage	TT	TSSA Executive Retreat (Texas)	Hyatt Regency Lost Pines	Cedar Creek, TX	17-18 Jun
25	Renters	10x10	NAA (National Apartments Association)	Mandalay Bay	Las Vegas, NV	24- 27Jun
26	Storage	Lit	CSSA Annual Self Storage Owners Summit (California)	The Balboa Bay Club	Newport Beach, CA	23 Jul
27	Storage	TT	MSSOA Conference and Show ((Missouri Self Storage Owners Association)	Hilton at the Ball Park	St. Louis, MO	9-11 Aug
28	Storage	20x20	SSA Fall Conference	Caesars Palace	Las Vegas, NV	8-11 Sep
29	Renters	10x10	IAA (Indiana Apartments Association)	Indiana Convention Center	Indianapolis, IN	16-17 Sep
30	Storage	10x10	TSSA (Texas)	Grand Hyatt	San Antonio, TX	27-29 Sep
31	Storage	TT	NYSSA (New York)	Turning Stone Casino	Verona, NY	28-29 Sep
32	Storage	TT	Northeast Storage Expo (MASSA & CTSSA)	Foxwoods Resort Casino	Ledyard, CT	7-8 Oct
33	Storage	TT	WSSA(Wisconsin)	The Kalahari Resort	Wisconsin Dells, WI	9 Oct
34	Storage	TT	GASSA Expo (Georgia)	De Soto Hilton	Savannah, GA	14-15 Oct
35	Storage	TT	MDSSA Annual Meeting (Maryland)	Hilton BWI Airport	Linthicum H., MD	14 Oct
36	Storage	TT	VASSA Annual Meeting (Virginia)	Embassy Suites	Richmond, VA	15 Oct
37	Storage	TT	PASSA Annual Meeting / Conference (Pennsylvania)	Eden Resort	Lancaster, PA	15 Oct
38	Storage	TT	SCSSA Trade Show (South Carolina)	The Hall at Senate's End	Columbia, SC	22 Oct
39	Storage	TT	SSAM (Self Storage Association of Michigan)	Greektown Casino Hotel	Detroit, MI	27-28 Oct
40	Storage	TT	FSSA Self Storage Owners Summit (Florida)	Disney's Yacht Club Resort	Lake Buena Vst, FL	5 Nov
41	Storage	TT	NCSSA Annual Convention (North Carolina)	The Omni Hotel	Charlotte, NC	15-17 Nov
42	Storage	TT	NSSOA Fall Conference (New England Self Storage Owners Association)			
43	Renters	10x10	NMHC OpTech (National Multifamily Housing Council)	Hilton Bayfront	San Diego, CA	17-19 Nov
44	Storage	TT	SSALA (Louisiana) Fall Expo			

SECTION 4:

Management of Exhibit Design/Production

Management Planning

Bader Company has been going through a lot of changes in 2015, and even though we had ambitious goals for the SSA (Self Storage Association) Show, our budget was very small. Not including travel and expenses, we had a total of \$2,900 to work with for our 20'x20' booth space.

I worked closely with one of our Account Managers to come up with creative ways to accomplish our objectives without breaking the bank. We received our expectations from our CEO, VP of Sales & Marketing and Client Development Director in early July and worked from there to establish our specific goals, strategies and tactics.

We conducted a few brainstorming sessions with our Sales and Marketing team to come up with concepts for the booth and show in general. It was clear to everyone that Bader University should be one of the main focuses, and that we also needed a general Bader space for the team to meet with clients and prospects.

Exhibit Design

With such a small budget, we did not have enough money for a new build for this show, and we did not receive approval from the Executive team to purchase a new exhibit. We had to reuse our 10'x10' displays and 24"x41" table top display created in 2013, and we decided to rent furniture and AV equipment. That helped us save on show costs and also implemented Green Exhibit Practices according to **Session 62414 – Green Trade Shows, Simple Tips and Tricks for Implementing Green Exhibit Practices.**

When Bader Company went through a rebranding in 2013, we worked with OSD Designs (Outside Source Designs, located in Indianapolis) to update our message and also all our graphics. An RFP process was not established, since that was part of the whole discovery and rebranding project that included a new website, collateral marketing and training presentations.

We worked directly with their designers to make sure the look and feel of our exhibit was consistent with our new branding. One thing that we did not take into consideration for the main graphic display was the hierarchy of the messaging. After taking the CTSM **Session 62015 – The @ Show Experience: Understand the Essential of Exhibit Design, ELC#6 Human Factors**, I learned that the order of information should be:

- 1- Top: Who (Your Company)
- 2- Middle: What (Specific Products)
- 3- Lower: Why (point of demo)

SECTION 4: Management of Exhibit Design/Production

As shown on the picture below (Main Graphic Display), our logo is lower than it should be, coming after our tagline. We will consider that for next time we work on our exhibit graphics and have the company name more prominent and on the top part. Our floor pull-up and table top displays do follow the messaging hierarchy.



We also worked with Thompson Kerr for the actual production of our displays. They were chosen for this project because they are a local company (no shipping costs!) and Bader had been working with them for many years. We also decided to reuse the crates and metal frames previously purchased from them, changing only the graphics and making the project even more cost effective.

These were our exhibit needs at the time:

- 2 (two) 8' x 10' fabric graphic displays, to fit on the metal portable and collapsible frames we already had. Lightweight for shipping and easy for one person to assemble.
- 1 (one) floor pull-up display. Lightweight and that could be transported as a carryon on a plane.
- 2 (one) table top pull-up displays. Also lightweight and that could be transported as a carryon.
- All materials should be durable for use over several years.

SECTION 4: Management of Exhibit Design/Production

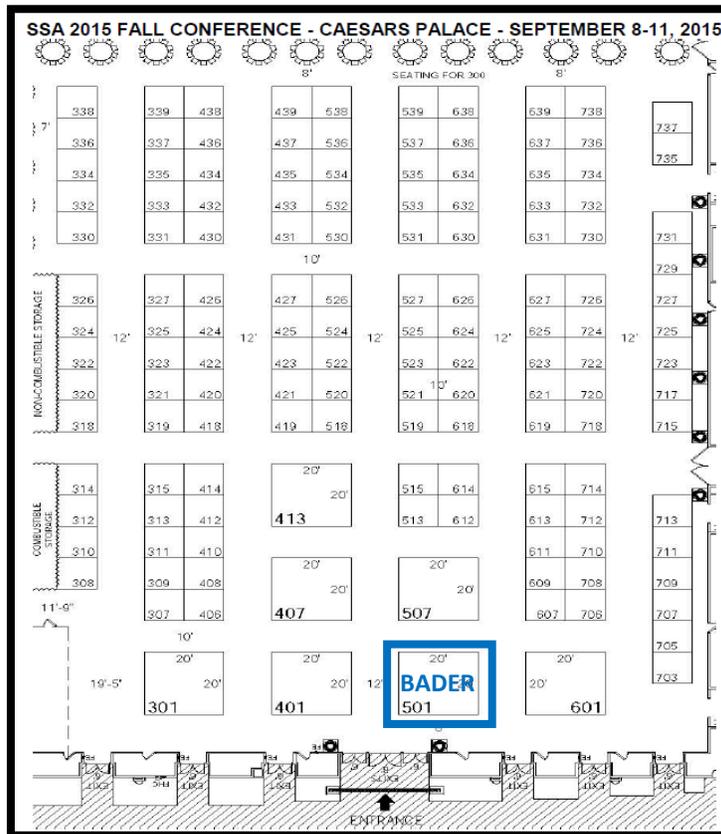
The picture below shows the final product, an 8'x10' Burst Flat Tension Fabric graphic on a collapsible metal frame.



SECTION 4: Management of Exhibit Design/Production

Production Strategies

For our 2015 SSA Fall show, we had a 20'x20' booth space and priority as to placement, per our Partner Plus agreement with the Association. We chose to be right by the entrance, to guarantee that every attendee would walk by our booth.



Having our main objectives in mind, we decided to divide the booth in 2 sections:

- Section 1: Bader University
Session 30715 – Creative Thinking to Reinvigorate Your Program reminded me to do something new that has never been done at a self storage show, to have a refreshing approach to our marketing. I had the idea of doing a classroom set up.

For that we needed:

- Chairs for the "students"
- Large TV screen to show the Bader U Introduction Video
- TV Stand/Cart
- Display for class schedule

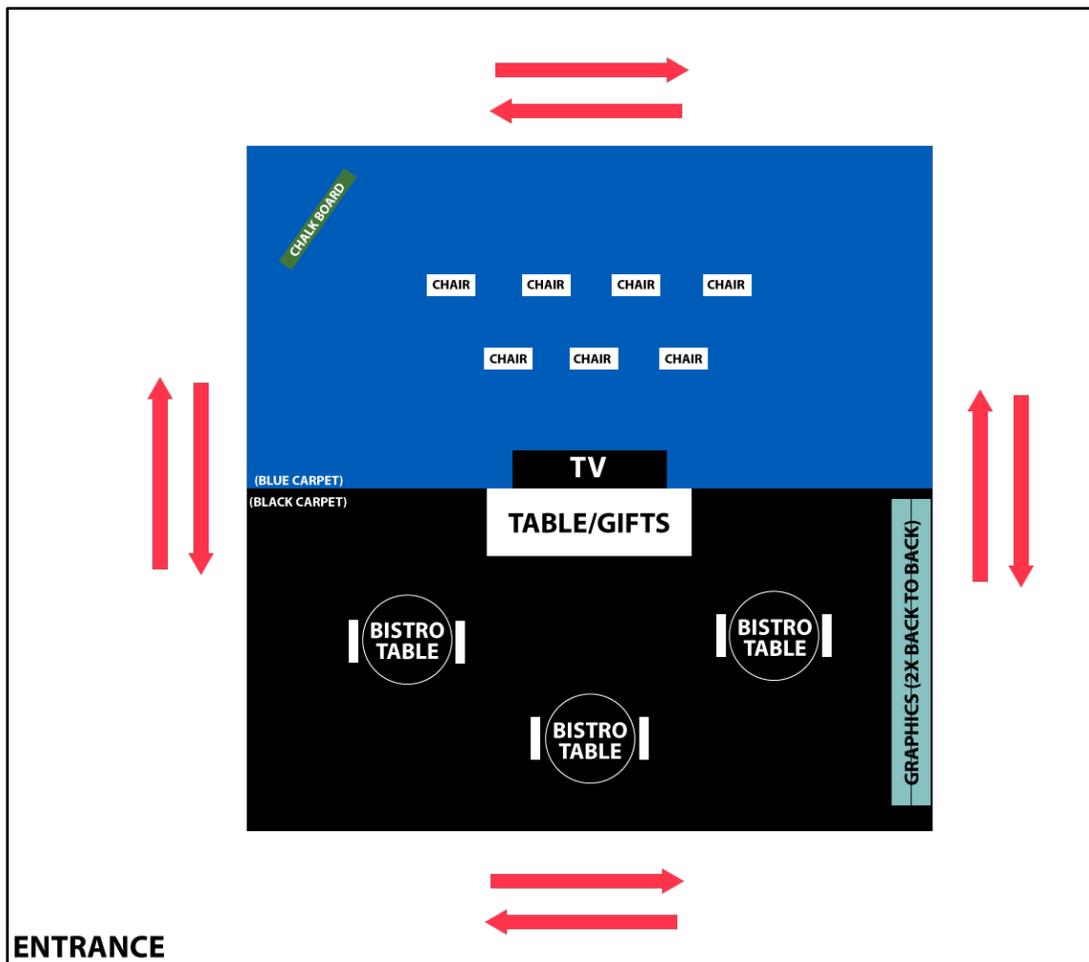
The chairs would be placed in front of a TV screen that would show the Bader U Introduction video (5 minutes long) on a loop without sound. At every hour we would

SECTION 4: Management of Exhibit Design/Production

have "scheduled classes" where we would turn the volume up and distribute short quizzes after each class. Every participant that took the quiz would be entered to win prizes – a Kindle Fire HD and a laptop backpack (keeping consistent with our theme).

- Section 2: General Bader
 - a) Bistro tables with chairs, so Account Managers and Executives could have enough space to meet with clients and prospects.
 - b) 8' table for giveaways: Bader U pens, Bader string-a-ling bags and Bader post-it notes.
 - c) Two 10'x10' Bader display back to back, so people could see our graphics from either side of the booth space
 - d) Bader table top display

Below is our initial floor plan – the space would be divided horizontally by having the carpet half black and half blue, not completely blocking each side of the booth:



SECTION 4:

Management of Exhibit Design/Production

Our total budget for this show was only \$2,900, including shipping and labor.

We did find a few creative ways to save on cost:

- To stay consistent with our “Classroom” theme, post-it notes and string-a-ling bags that we already had from previous events were used as giveaways (see Appendix 1).
- We ordered Bader U pens and lapel pins (see Appendix 1) under our yearly promotional budget – a different budget that did not count under our trade show budget.
- We also took advantage of Nevada being a “Right to Work” State. **Session 20915 – Show Operations Basics – Part 2: On-Site Implementation** taught me that our full time employees could set up our booth in Las Vegas. We had our team put our exhibit together, saving money in labor.
- Basic furniture was rented from Freeman, the General Contractor of the show.
- I personally created Bader U pennants to decorate the booth and the quizzes for the classroom.



BADER U QUIZ

1. The Facility Manager is an Insurance Agent.
 True False

2. Offering insurance mitigates _____.

3. What is not a Common Objection to Tenant Insurance?
a. I have my own Insurance.
b. My items aren't worth anything.
c. Insurance Rules!
d. This Coverage Seems Expensive.



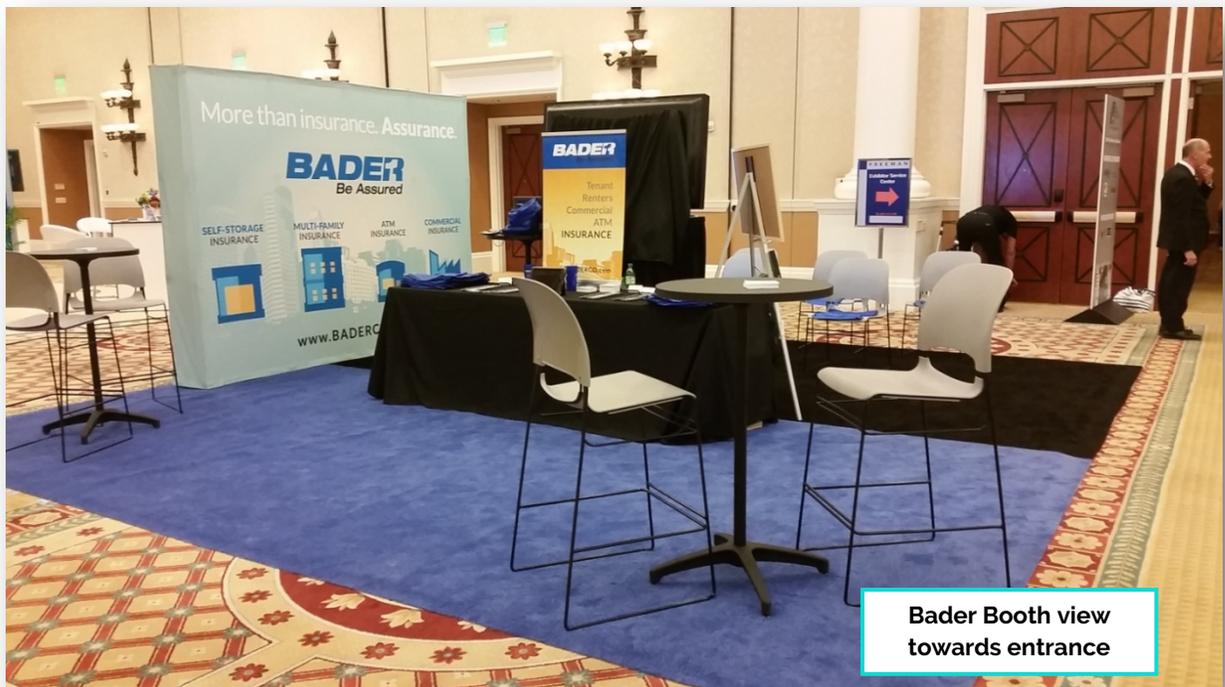
Name: _____
Company: _____
Email: _____

Once we arrived at the exhibit hall, we made a few changes to the floor plan. We removed a bistro table and 2 chairs and switched the order of the booth sections: Bader U was set up closest to the entrance with the TV facing out, so everyone entering the room would have a chance to see our video.

SECTION 4: Management of Exhibit Design/Production



**Bader Booth view
from Entrance**



**Bader Booth view
towards entrance**

SECTION 4: Management of Exhibit Design/Production



General Bader Section

Bader U Section



8' Table with giveaways and table top display

SECTION 4: Management of Exhibit Design/Production



SECTION 4:

Management of Exhibit Design/Production

Budget vs. Actuals

Below are our *Actuals* for the show versus our *Total Budget* - we did not have an itemized budget for this event.

Equipment	Amount/Days	Total
Normal Chairs	7	\$483.00
SoHo High Top Tables	2	\$432.50
High Top Chairs	4	\$464.00
8' Table	1	\$68.75
42" Plasma + Labor	1	\$1,087.12
54" Roll Cart w/Skirt	2	\$88.00
Carpet-Black	1	\$348.00
Carpet-Blue	1	\$348.00
Carpet Padding	1	\$388.00
Showlead Mobile Essential 3 Licenses	1	\$450.00
Easel	1	\$68.00
Chalkboard	1	\$22.13
Chalk	1	\$4.87
Kindle Fire HD6	1	\$99.00
Laptop Backpack	1	\$68.00
Electrical	1	\$298.50
Bader U Pennants	25	\$25.00
Bader U Lapel Pins	50	191.84
Shipping Costs (Crate and Boxes)		\$337.45
Total Expense		\$5,272.16
Original Budget		\$2,900.00
Difference		(\$2,372.16)

Even though we were over budget for the show, we received approval from the Executive team on each expense and they also agreed to increase our Trade Show budget for next year.

SECTION 5:

Management of Integrated Marketing Communications

Planning and Goals Setting

Our main objectives for the show were to manage and strengthen relationships with top current clients, to inform and show clients and prospects how they can increase Tenant Insurance participation with Bader Company and to introduce the Bader U Portal. To accomplish these goals we used different communication methods throughout a few marketing channels:

Integrated Marketing – Communication Methods				
Method	Rationale for choice	Objective	Measurement	Result
<u>Globe Magazine Ad:</u> September Issue	<ul style="list-style-type: none"> Included in package Low cost per impression Seen by most show attendees 	<ul style="list-style-type: none"> Generate leads Brand awareness Invite attendees to our booth 	<ul style="list-style-type: none"> Total Impressions for issue 	27,200 impressions
<u>Pre-Show Email Blast:</u> to pre-attendee list provided by Association	<ul style="list-style-type: none"> Inexpensive Targeted reach 	<ul style="list-style-type: none"> Generate leads Invite attendees to our booth Inform about Bader U 	Emails Opened: 20% (Industry Average)	<ul style="list-style-type: none"> 274 Emails Sent 94 Opened (36%)
<u>Show signage/Lunch Sponsorship/Logo on Hotel Conference TV Channel</u>	Included in Package	Name recognition	Name recognition	Name recognition
<u>On-Site Brochure and Proceedings Ad</u>	Included in Package	Brand Awareness	Brand Awareness	Brand Awareness
<u>Private Dinner:</u> Clients and Prospects (Session 403 – Small Exhibitors: Increase Success with Activities Outside your Booth)	<ul style="list-style-type: none"> Controlled environment to talk to clients and prospects Separate budget 	<ul style="list-style-type: none"> Manage and strengthen relationships with clients One-on-one time with prospects 	100 guests at Dinner	Total of 109 people - Room filled to capacity (see Appendix 2)
<u>At-Show Email Blast:</u> to prospects and clients that stopped at our booth (scanned badges)	<ul style="list-style-type: none"> Inexpensive Targeted reach Fast delivery 	<ul style="list-style-type: none"> Continue conversation after booth meeting Entice prospects and clients about increasing insurance participation 	Emails opened: 50%	<ul style="list-style-type: none"> 31 Emails Sent 17 Opened (55%)
<u>Bader U Video Presentation:</u> on Large TV Screen	<ul style="list-style-type: none"> Fun way to introduce Bader U Reach: Many people could watch it at once 	<ul style="list-style-type: none"> Introduce Bader U Portal and training video 	Video watched by at least 20 people in its entirety	31 people watched the video
<u>Post-Show Email Blast:</u> To post attendee list provided by Association	<ul style="list-style-type: none"> Targeted reach Inexpensive 	<ul style="list-style-type: none"> Extend brand awareness Continue promoting Bader University Keep channels of communication opened 	Emails Opened: 20% (Industry Average)	<ul style="list-style-type: none"> 553 Emails Sent 178 Opened (35%)

SECTION 5:

Management of Integrated Marketing Communications

Association Partnership/Sponsorship

Bader Company has many benefits as the exclusive insurance partner of the National Self Storage Association that extends beyond trade shows.

Included in our package (\$75,000 annually) are eleven 4-color full-page ads (one each) in eleven issues of *SSA Globe* (Official Magazine of the SSA), in addition to one 2-page spread (\$21,359 value). We used the September ad not only to promote the company, but also to invite attendees to visit our booth at the show (see page 19).

Using the formula learned on **Session 20315: The Nuts and Bolts of Budgeting for Results - ELC#4 Establishing Budget-Based Goals** and numbers provided by the association, I could estimate our CPI (cost per impression) per issue. According to the Audit Bureau of Circulations (ABC), the magazine has a print circulation of around 16,000 copies, giving us a total of **27,200 impressions** (average of 1.7 pass around impressions) for the magazine alone. With the cost for a full page ad being \$2,369, our cost per impression would be \$0.09. Since Bader purchases a partner package, our cost per impression is even lower!

Some of the other benefits we received with our Partner Package that relate to the Fall Show are:

- Company name/logo on Center Stage prior to/during all SSA General Sessions and breaks
- Partner Sponsorship of SSA Trade Show lunches with appropriate signage
- On-Site Brochure – half-page 4-color Advertisement (see page 19)
- Proceedings Manual – full-page 4-color Advertisement (see page 19)
- Signage – Partners Signage stations (throughout conference trade show venue)
- Placement of company logo & voice-over promotion in SSA Conference headquarters hotel TV channel Loop program



I recommend that we keep taking advantage of our Partner Plus Package and make sure we utilize all the marketing tools they have available for each show.

SECTION 5:

Management of Integrated Marketing Communications

To increase effectiveness, brand awareness and overall impression, I applied many elements learned on **Session 61715 –Graphic Boot Camp**. ELC#5 reminded me to keep the same theme, color treatment and look and feel to all our promotional efforts.

September Ad 2015– SSA Globe

More than storage insurance. Assurance.

TRAINING EASY ENROLLMENT CLAIMS

WHILE INSURANCE IS OUR BUSINESS, THE ASSURANCE OF OUR PARTNERS AND CUSTOMERS IS OUR FOCUS

- ✓ Tenant insurance helps to mitigate risk to your business and your property
- ✓ Training on all products and coverage options is provided
- ✓ Claims are handled for you
- ✓ Your tenants have quick and easy claim support
- ✓ Month to month participation makes it easy for tenants
- ✓ Tenant customer support via the web or phone
- ✓ Peace of mind

Come see us in Vegas at the SSA Fall Show

AN EMPLOYEE OWNED COMPANY **BADER** Be Assured Questions? Call 888-223-3726 or visit www.baderco.com

On-Site Brochure Ad

More than storage insurance. Assurance.

TRAINING EASY ENROLLMENT CLAIMS

WHILE INSURANCE IS OUR BUSINESS, THE ASSURANCE OF OUR PARTNERS AND CUSTOMERS IS OUR FOCUS

AN EMPLOYEE OWNED COMPANY **BADER** Be Assured Questions? Call 888-223-3726 or visit www.baderco.com

Coverage for:
Fire/Smoke
Hurricanes
Tornados
Earthquakes
Roof Leaks
Burglary
In Transit
and more!

Proceedings Ad

More than storage insurance. Assurance.

TRAINING EASY ENROLLMENT CLAIMS

WHILE INSURANCE IS OUR BUSINESS, THE ASSURANCE OF OUR PARTNERS AND CUSTOMERS IS OUR FOCUS

- ✓ Tenant insurance helps to mitigate risk to your business and your property
- ✓ Training on all products and coverage options is provided
- ✓ Claims are handled for you
- ✓ Your tenants have quick and easy claim support
- ✓ Month to month participation makes it easy for tenants
- ✓ Tenant customer support via the web or phone
- ✓ Peace of mind

Coverage for:
Fire/Smoke
Hurricanes
Tornados
Earthquakes
Roof Leaks
Burglary
In Transit
and more!

AN EMPLOYEE OWNED COMPANY **BADER** Be Assured Questions? Call 888-223-3726 or visit www.baderco.com

SECTION 5:

Management of Integrated Marketing Communications

Pre and Post Show Email Blasts

Email blasts are an inexpensive and fast way to communicate with our clients and prospects. The Self Storage Association provided us with the attendee lists and we created the emails in-house with *Constant Contact*. We usually try to send pre and post show email blasts, but we haven't done a good job for smaller shows. **After receiving positive results for this initiative, I would recommend that we start utilizing this tool for all our future shows.**

For the SSA show we wanted to keep the message simple, and focus on informing people about Bader University.

Pre-Show Email

More than storage insurance. *Assurance.*



TRAINING



EASY ENROLLMENT



CLAIMS

Come see what's new with **BADER** at the SSA Fall Show

Stop by our booth #501 to watch a quick demo of our new **Bader U Training Portal** and enter to win a Kindle Fire HD and other fun prizes!

Bader University
Tenant Insurance Education "On Demand"

The marketplace spoke, Bader listened. We are working hard to bring our clients another tool to help supplement our premiere training program. **Bader University** will make tenant insurance training convenient, fast, simple and efficient.



The **Bader U Online Portal** is our new **On Demand** training tool, created specifically for the busy on-site staff that is focused on renting units and serving the tenants. With short modules and a friendly interface, your staff has the flexibility to watch the videos whenever they can, pause it, rewind it, watch it again. After they complete the training, they will receive a **Bader U Certificate** and can go back anytime for refreshers and updates.

With **Bader U** you and your staff have immediate access to a great and robust training experience! **On Demand.**

Bader U is expected to launch by the 4th Quarter of 2015. Come talk to us to learn more about all the great new improvements we are making to serve you and the Self Storage industry.

[See you in Vegas!](#)

AN EMPLOYEE OWNED COMPANY
BADER
Be Assured

Tenant Insurance | Training | Licensing | Disaster Response | Commercial Insurance

Post-Show Email

More than storage insurance. *Assurance.*



TRAINING



EASY ENROLLMENT



CLAIMS

We hope you had a great time in Las Vegas!



Did you have a chance to stop by the **Bader** booth and watch one of our **Bader U** training videos? What did you think? We look forward to hearing your feedback and would love the opportunity to share with you all the innovative improvements we are making to serve you and the Self Storage industry.

[For more information, contact us today.](#)

AN EMPLOYEE OWNED COMPANY
BADER
Be Assured

Tenant Insurance | Training | Licensing | Disaster Response | Commercial Insurance

(888) 223-3726 | www.baderco.com

SECTION 5: Management of Integrated Marketing Communications

At-Show

For the Bader U section of our booth, we had 7 chairs facing a TV screen, showing the Introduction video for our training portal. Because of our budgetary constraints, we had to be very creative to make that half of the booth feel like a classroom. A simple and inexpensive tool that we used to communicate our class schedule and prizes was a chalkboard. I also made pennants (see page 12) to decorate the booth and incorporate the Bader U logo to the design. We spent less than \$125 (board, chalk, easel and pennants) and somehow those were the details that received the most compliments!

I suggest that we keep finding creative ways to deliver our message, it seems like great ideas are born when we are compelled to think outside the box.



Chalkboard, Pennant & Prizes

At-Show Email

Thank you for taking the time to stop by the **Bader** booth today!
We want to know, what **Level** do you want to achieve? **Level 3** is the way to go and we will be following up with you to help start your journey to **Level 3** Status!

TENANT INSURANCE

LEVEL 3

AN EMPLOYEE OWNED COMPANY
BADER
Be Assured

For more information about Bader Company, please visit our website www.baderco.com.

[Tenant Insurance](#) | [Training](#) | [Licensing](#) | [Disaster Response](#) | [Commercial Insurance](#)

The general Bader section was focused on informing and showing clients and prospects how to increase Tenant Insurance participation levels. Our staff had tablets available with presentations and illustrations and they were also responsible for scanning prospects' badges. Each day after the show we sent a follow up email to leads scanned that day, to keep the information fresh in their minds, continue the conversation about insurance and to assure that we would follow up. This was the second show we used a lead retrieval system and it was a great tool to help our team collect prospects' information. **I am not sure it is something that we need for smaller shows, but I strongly recommend that we start using it for our larger trade shows.**

SECTION 5: Management of Integrated Marketing Communications

Booth Staff

A crucial part of our trade show program is our staff, we consistently send team members from our Sales & Marketing Department to represent the company. According to **Session 21315 – Beyond the Basics of Booth Selling**, “Staff accounts for 85% of your show success,” I always recommend that we have the most qualified people for each event. For this show we had 6 employees at the booth, including me: our VP of Sales & Marketing, the Client Development Director, one Account Executive, and two Account Managers. Our CEO visited the Conference and Trade Show floor for the first day and both he and the Chairman of our Board attended our private dinner at Joe's Seafood.

A few pre-show meetings were held before we left for Las Vegas to clarify show goals and objectives, explain our strategies and finalize logistics – **Session 20415 – Don't Skip the Meetings**. I made sure everyone was familiar with the Bader U Videos, the booth's floor plan and the lead retrieval from *Showlead* that would be used to capture prospects' information.

We also conducted a pre-show meeting 30 minutes before the show floor opened on the first day, to make sure the booth was ready to go. Unfortunately we had to deal with some technical problems with our TV, and were a little rushed when the doors opened. **For future shows I recommend that we arrive at least an hour early and have a technician available to help us with any issues.**

The week after we returned to our office, a post-show meeting was held to go over what worked and what didn't work, the effectiveness of our strategies and tactics, and to hear recommendations for future shows from the staff.



Bader Team at Joe's (from left to right): Tim Parnell (Client Development Director), Josh Nicholson (VP of Sales & Marketing), Marcia Deem (Marketing Coordinator), Chuck Dodge (Sr. Account Executive), Christy Lewis (Sr. Account Manager), Tim Stapleford (Chairman of the Board), Darrell Gambero (CEO) and Richard Witka (Sr. Account Manager)

SECTION 6: Management of Results Reporting

Results

When it comes to trade shows, measuring and reporting results is something new to me and to our team. The CTSM program helped me understand the importance of measurement, but also taught me how it could actually be done. **Session 10815 – How to Measure the Value of Trade Show Participation** showed me many ways I could capture and report my results from our events. Having clear and measurable objectives was a critical start to this process.

The show objectives set for the SSA (Self Storage Association) Fall show were:

1. Manage and strengthen relationships with top current clients
2. Inform and show clients and prospects how they can increase Tenant Insurance participation with Bader Company
3. Introduce the Bader U Portal and new innovations that we will be rolling out in the 4th Quarter of 2015 and beyond.

Measurable Goals:

Objectives	Measurable Goals
Manage and strengthen relationships with top current clients	<ul style="list-style-type: none"> • Meet with <u>Top 37 Clients</u> • All <u>6 staff members</u> present at the booth
Inform and show clients and prospects how they can increase Tenant Insurance participation with Bader Company	<ul style="list-style-type: none"> • Target <u>20 Lower End</u> of the Spectrum Clients (Less than \$10K Yearly Revenue) • <u>25 New Fresh Leads</u>
Introduce the Bader U Portal and new innovations that we will be rolling out in 4th Quarter 2015 and beyond	<ul style="list-style-type: none"> • Show Bader U Introduction video to at least <u>20 people</u>: clients and/or prospects

Measurable Goals	Results
Meet with Top 37 Clients	15 of our top 37 clients attended the show. We made contact with 100% of them through our dinner at Joe's, trade show floor and meetings.
All 6 staff members present at the booth	All 6 staff members were at the Trade Show floor during the show. Team did a great job working together and being at the booth interacting with attendees.
Target 20 Lower End of the Spectrum Clients	8 attended the show. We made contact with 7 of them.
25 New Fresh Leads	32 Leads captured using the Showlead retrieval system
Show Bader U Introduction video to at least 20 people	We had 31 people attending the class, watching the video in its entirety and taking the quizzes.

SECTION 6: Management of Results Reporting

The goals set for the 2015 SSA Fall Show were met. The Bader U introduction was a success. Attendees enjoyed the classroom set up and commented on how creative it was. The video playing on a loop drew attention to the booth and created curiosity among attendees, especially current clients that were interested in starting using the videos at their facility as soon as possible.

Our staff was prepared and knowledgeable, and worked together to collect qualified leads using the *Showlead* retrieval system. They also met with our top clients and “low revenue” clients that attended the show and all of them attended our private dinner, which was also a big hit. We received many compliments and Thank You cards when we returned (see Appendix 3).

The Account Managers and Account Executive followed up with prospects and clients by phone or email within two weeks after the conference. We will continue to monitor the results achieved from the show.

These are the tactics that worked and that I recommend for future trade shows:

- Lead retrieval system to capture prospects' information
- Pre, At and Post Show Email Blasts using Constant Contact
- Tablets for team member with pertinent presentations and videos
- Private dinner for clients and prospects

These are my recommendations for improvement:

- Budget should be discussed in depth with Executive team, to make sure we have enough to accomplish our goals.
- Team should arrive at the booth one hour before the show starts on the first day, instead of just 30 minutes. Booth was not 100% ready when the doors opened.
- Low revenue clients might not be a good target for larger shows; they don't seem to attend out of town conferences.

Reporting Results

As mentioned before, I was not familiar with reporting results after trade shows, but the CTSM program taught me the importance of communicating our results to upper management. Not only can I show them our successes, but I can also justify asking for a higher budget for next year.

Once we had our post-show meeting, I created a two-page summary that was given to the VP of Sales & Marketing and the Client Development Director to be shared with the rest of the Executive team. I kept it simple and included our main objects, specific goals and results, recommendations and an overall conclusion.

SECTION 7: Conclusion

Assessment and Recommendations

All the lessons I have learned from the CTSM courses have helped in having a successful SSA show this fall. By incorporating measurable goals and applying effective and creative strategies and tactics, we were able to achieve our main objectives. I am extremely proud of myself and our team for what we have accomplished through our hard work and collaboration.

We have come a long way, but our program still has a lot of room for improvement. To continue adding to our bottom-line we need to keep investing in strengthening our relationships with our clients and generating qualified leads at every show, not only the larger ones. The main aspects I believe we need to focus on and apply to all events are:

- Establish specific and measurable goals
- Report results to management
- Stay consistent with our brand and message

I also plan on working with upper management to increase our budget, so we are able to build a new booth for 2016.

Learning Experience

The experience of writing this portfolio has been a great learning journey. It helped me realize how much of the concepts learned through the CTSM program I was able to implement to our own trade show and marketing program. And this is just the beginning, I plan on applying my acquired knowledge to improve our program even more and consistently measure our trade show results.

I started working on my portfolio right after I got back from the Chicago FastTrak in August. I was there mainly to take the final exam, but ended up enrolling in a few classes as well. The timing was perfect to take **Session 513 – Mind Your Own Business – Personal Promotion to Jump Start Your Career**, it inspired me to be confident about my accomplishments and focus on my personal promotion.

I believe that the CTSM program has been a crucial part of my overall professional development. It has taught me how to demonstrate the success of my efforts and gain the respect of my peers and directors.

I would like to thank everyone involved with the program: all the hardworking staff, presenters and advisors. I am truly grateful for all you have taught me. I look forward to continue being a part of this great community and supporting our industry. I hope you will consider me worthy of receiving the CTSM designation.

Sincerely,
Marcia Deem

REFERENCES

SESSION CODE	CTSM SESSION TITLE	PAGE
Required		
20115	Selecting the Right Shows: The Critical Decision	4
62015	The @ Show Experience: Understand the Essential of Exhibit Design	8
30715	Creative Thinking to Reinvigorate Your Program	11
20915	Show Operations Basics – Part 2: On-Site Implementation	13
20315	The Nuts and Bolts of Budgeting for Results	19
61715	Graphic Boot Camp	20
21315	Beyond the Basics of Booth Selling	23
20415	Don't Skip the Meetings	23
10815	How to Measure the Value of Trade Show Participation	24
Elective		
624	Green Trade Shows	8
403	Small Exhibitors: Increase Success with Activities Outside your Booth	18
513	Mind your own business	26

APPENDIX

1 – Promotional Items

Bader U Lapel Pin



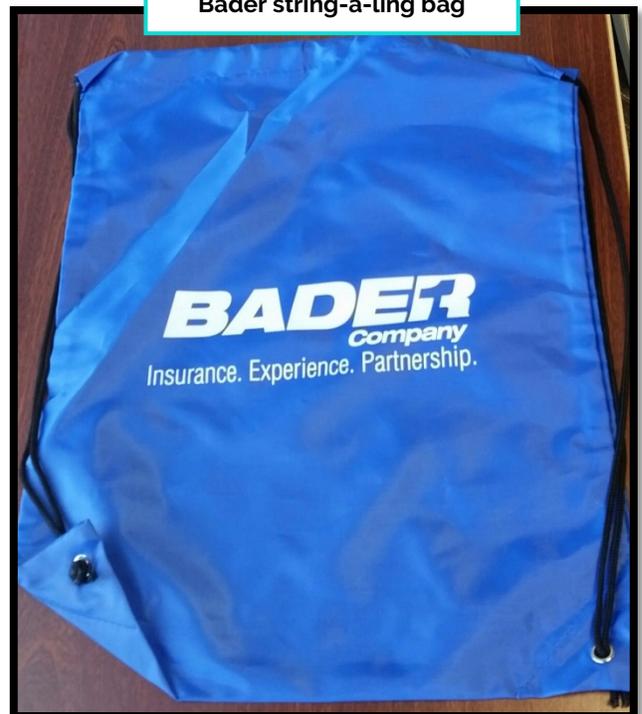
Bader U Pen



Bader Post-its



Bader string-a-ling bag



APPENDIX

2 – Private Dinner



3 – Thank You note from client

JAY E ALLARDT 14 Sept 2015

My friends at Bader —

Thanks so much for dinner at Joe's in Las Vegas last Wednesday. As usual the drinks and food were delicious.

Thanks too for the personalized journal. Glad to be able to do business with an Indiana based company!

Thanks,
Jay