



Events Audit Procedures & Timelines

The Event Audit process can be divided into three stages:

- 1) **Pre-Event**
- 2) **On-Site**
- 3) **Post-Event**

Timelines discussed are ideal and are subject to change based on factors such as:

- a. The date membership agreement and payment are received by BPA from the organizer
- b. The time frame within which the organizer or registration company sends all required data
- c. If all data is sent at one time or is sent piecemeal by the organizer or registration company
- d. The accuracy of the data provided by the organizer and tested through the confirmation process

1. **PRE-EVENT: 1-2 months prior to show** (timing dependant on when contract signed)

- a. All information is kept confidential unless otherwise specified on the contract by the Organizer
- b. Organizer completes all paperwork including application for membership and questionnaire
- c. Organizer will pay 100% of audit fees prior to BPA Worldwide attending event to be audited
- d. Review of registration process including registration forms and method of proving attendance
- e. Examination of database, including testing of live data (if possible)
- f. Organizer to discuss with BPA what demographics and other data are to be reported (4 demos are included with Event Audit service and Event Insights service basic fees. These demos are to be single-response questions from the registration form. No demos are included with Attendance Audit service)
- g. Organizer must send registration code to BPA representative attending the event to be audited (this code will allow the auditor to experience pre-show registration and should allow for access all areas of the event for free)
- h. Registration completed by BPA representative attending event (this includes "Seeding" of data by BPA auditor to test non-verified portion of database. "Seeding" refers to registering names of visitors BPA knows will not attend, which then tests the verification method of proving who was at the event and who did not show up)
- i. 4-5 weeks before show, the BPA auditor will confirm that all required paperwork has been sent and all aspects of the audit process have been discussed. Paperwork will be reviewed one last time and any changes to the information to be audited are made at this time. A conference call or face-to-face meeting between BPA and the Organizer will be completed at this time. Any questions or comments regarding all aspects of the show registration or audit process should be discussed. An on-site meeting at the show to be audited between the BPA representative and Organizer will be set at this time including date, time and place

Basic Audit Procedures – cont.

2. ON-SITE:

- a. Observation of registration system occurs for all visitor categories (based on answers given in pre-show questionnaire) and for the verification methodology (the way the registration company proves that visitors actually attended the event). Some visitor categories may include:
 - 1) Conference Delegates
 - 2) Exhibit Only Visitors / Attendees
 - 3) Media / Press
 - 4) Speakers
 - 5) Exhibitor Personnel
 - 6) VIPs
 - 7) Students
 - 8) Domestic Visitors / Attendees
 - 9) International Visitors / Attendees
- b. Testing of registration process and security measures for access to exhibits and conference sessions occurs on-site
- c. Meeting with registration and Organizer contacts on-site is very important to BPA Worldwide and should occur if at all possible (The rep. can answer any questions and confirm all demos and/or data to be reported – meeting was to be set up during pre-show process)
- d. BPA representative will be in attendance one-two days of the event to complete all paid on-site processes. All observations are conducted in a totally non-intrusive manner so as not to interfere with the registration process or the flow of visitors within the event.

3. POST-EVENT:

- a. Registration database must be sent to BPA Worldwide for final portion of audit to begin – this must include ALL records that were gathered by the registration database PRE-SHOW and ON-SITE, including those registrants who did not attend – a field should be included in the database that will tell the Organizer and BPA which visitors are proven to have attended and which ones registered and did not show up. The database MUST include ALL records in the interest of full disclosure which is a basic rule of any and all auditing. The process to receive the database in proper format should take between 2 weeks (minimum) and 4 weeks (maximum) after the last day of the event to be audited.

*(The sooner the data can be analyzed by BPA, the sooner BPA can have the report back to the Organizer for use as a sales and marketing tool by their staff.)

- b. Organizer may prefer to remove most contact data fields (columns with address, city, province, email and phone – Asia/Pacific Region only) from the database prior to sending to BPA – all other data fields must remain in original format including:
 - All records including those who attended and those who did not
 - Contact Name
 - Company Name
 - Country
 - Postal Code
 - Visitor Code for type of visitor attending
 - List of Exhibitors attending (and an explanation of whether or not they were verified)
 - Verification Code Field (proof of attendance - this field tells the auditor who attended and who did not attend)
 - Demographics from registration form (on-line or hard copy)
 - Attendance by day captured for all visitors
 - International Visitors or Exhibitor Personnel
 - Any other data that was captured by the registration company through the pre-show or on-site registration process

Basic Audit Procedures – cont.

- c. Auditor inspects database to check coding and fields (demographic / geographic records). Organizer will be asked to re-send database if all above items or items agreed upon to be audited are not included in the database. All records (those who attended and those who did not) must be included in the database as explained in paragraphs “a” and “b” above (This process should take less than 1 day – if information is missing, the Organizer must be contacted and the missing data added back in)
- d. Auditor tests the “verified” (those visitors and exhibitors proven to have attended) portion of the database for duplication (This process takes less than 1 day). Three regions/states are chosen for duplication testing (checking to see how many – if any - duplicate names are in the database). If the test is below BPA tolerance level for these three regions/states, the database is determined to contain minimal to no duplication and the process moves to confirmation testing.
- e. Auditor sends “verified” portion of the database to the BPA Electronic Auditing department (located in-house) – this is done so four samples of the database can be pulled out and confirmed by telephone that these visitors did attend. This test provides BPA with a very high level of confidence that the data (attendance and demographics) the auditor is counting is accurate. A total of 429 records are pulled from the database to be telephoned (this information is pulled from the database in 4 test blocks of 309 records, 40 records, 40 records and 40 records). This is referred to as the confirmation test sample.
- f. If any of the 429 records were registered by hard copy form on-site or pre-show, these forms will need to be sent to BPA as source documents to prove the registration was completed.
- g. The 429 records are tested (by phone) by confirmation specialists at the same time the auditor is preparing the audit for preliminary review by the Organizer. Once the required number of people has been spoken to (up to 50% of the 429 records) the answers are analyzed and the database is confirmed as accurate to be counted. If there is more error in the data (negative answers to the question “Did You Attend the Show”) than tolerance levels allow, the Organizer will be contacted and discussion will follow based on the particular problem found (Confirmations test take about 5 working days to complete).
- h. Auditor sends preliminary “unofficial” summary report (in excel format) to Organizer for review and asks Organizer if they will become a BPA member which will include their audit on the BPA website (the report numbers become official after the BPA Internal Audit department has reviewed the audit file). The Organizer is asked to proofread the “unofficial” report for spelling and informational errors pertaining to the show data. No changes should be made regarding data to be reported at this point in the process, as agreed upon during the pre-show and on-site discussions (approval turn-around timing depends on how quickly the Organizer reviews the report).
- i. Auditor receives results of the confirmation test and approval by the Organizer for the “unofficial” report in excel format. The audit report is then sent to the Internal Auditing department for review (1-2 days). The report will be presented to the Organizer in pdf format for final approval (approval turn-around timing depends on how quickly the Organizer reviews the report).
- j. 100 printed copies are then sent to the Organizer (if Organizer is going to make the report public).
- k. Training for Organizer sales staff on how to read the Audit Report and its use as a sales and marketing tool is provided (if Organizer is interested)

4. PAPERWORK FOR THE AUDIT

Prior to commencing the audit, BPA will send a Parameter Letter detailing the materials required to start the project and will ask that an Audit Questionnaire be completed and returned to the auditor.

It is required that all contact information for the show Organizer and their registration company is completed in the appropriate sections of both the Application for Membership and the Audit Questionnaire.

5. SUMMARY

The BPA trade show audit process takes place in three stages; pre-show, at-show and post-show. Organization and communication is the key to success and BPA representatives strive to make all processes within those stages as clear and concise as possible. The audit process should be seamless for both the Organizer and BPA Worldwide.

The Organizer will benefit greatly from the resulting information the audit report will provide and BPA recommends the Organizer to share this information publicly with their clients (exhibitors and attendees) and the rest of their industry. Reliable measurement metrics are important to the growth of the trade show industry in general and the audited information contained in each report is the basis for those metrics.