

# Make the most out of conferences: A checklist



## Prepare

Preparation can help you get the most bang for your buck (and time).

### Research which conferences you'll attend.

#### Look for discounts and benefits.

Many conferences have early bird registration deals, discounts with partner hotels, and so on.

#### Review the agendas.

Don't just sign up because you like the sponsor. Review the agenda and make sure it's worthwhile for you to attend the conference. Is it different from other conferences you're planning to attend?

### Prepare for each conference.

#### Select your sessions.

Try to pick a good balance (i.e. don't select all investing-related sessions unless that's your big focus for the year).

#### Research sponsors and exhibitors.

Make a list of those you want to visit with and learn more about. Note why you want to talk to them, including any specific questions you have. Set aside time to meet with exhibitors that catch your eye in person, too.

#### Budget your time.

To help manage your schedule, think through what you want to achieve. Do you want to network, learn about new technology, or something else?

#### Download the conference app.

This can help you navigate conference halls and update your plans on the fly. (You can always delete it after the conference wraps.)

### Pack smartly.

#### Pack comfortable shoes.

#### Remember business cards.

#### Leave room for swag.

#### Make a list of your must-haves, and make sure you packed them.

#### Double check you have a phone and computer charger, toothbrush and toothpaste, and deodorant.



## Make the most of your time

Put your preparation to work and accomplish what you came for.

- Visit with sponsors and exhibitors.**
  - Use your list and note who you've visited. Try to take notes in real-time to remember what was said. This makes following up easier if you need to.
- Stay on top of social media.**
  - Be sure to use the event's hashtag(s). Using the hashtag can help you connect with other professionals beyond those you'll naturally encounter in person.
- Attend social events.**
  - Have fun!**

Yes, it's a work event, but some of the best connections are made at meals, happy hours, concerts, and other fun activities arranged by the host. Plus, you can use the events as topics of conversation throughout the weekend.
- Take care of yourself.**
  - Get enough sleep, hydrate and remember to eat.**

It might sound silly, but it can be easy to get overwhelmed by a packed schedule. Try to carry a bottle of water with you and keep track of how you're feeling.
- Enjoy the host city.**

If you have time, try to see some of the sites. This can help you avoid burnout if you attend multiple conferences throughout the year.
- Get outside.**

Consider starting your day with a walk or run. Fresh air can help before a day inside a conference hall, and you can explore more of the host city.



## Follow up

Get the most out of your time at a conference by following through with the connections you made.

- Organize contact information.**
  - Log business cards.**

Input contact information into your firm database to help you stay organized and avoid clutter. There are apps that can help with this. For instance, we love CamCard.
  - Connect on social media.**

Whether it's LinkedIn, Twitter, or Facebook, social media can often be the best (and quickest) way to stay connected.
- Review your notes.**
  - Prioritize your follow-ups.**

You likely had some conversations that were more impactful than others. Note which meetings require you to take action now. For instance, perhaps you want to...
  - Schedule a demo with Advyzon.**

Just kidding. Sort of. But do request demos of technology that interests you, and send thoughtful or specific follow-up notes.
  - Offer help when possible.**

Remember, networking is about offering help as well as tapping into new resources. If you're in a position to help someone, or if they reach out, be sure to respond and follow through.
- Implement your takeaways.**
  - Discuss what you learned.**

Make sure to debrief your team, including partners and staff. If you aren't sure how to distill what you learned, try this as a guide:

    - Sharing overall industry trends.
    - Note the most surprising things you learned.
    - Explain any ideas you'd like to implement.
    - Ask if they have any questions.
  - Submit continuing education credits.**

Every conference is different, and you may have your own personal system for making the most out of your time there. We hope this checklist helps you stay organized. And we hope to see you out there.

**Follow Advyzon on social media to see where we'll be. We'd love to say hi.**