



## Maximizing your conference experience

*Conference (verb) 1. to actively engage in and shape one's conference experience*

A friend of mine used to tease me for the way I “conference.” Whereas she’s most comfortable moving from session to session, I have always actively shaped each conference experience, treating the whole conference experience like a verb. For the past 12 years, conferences have been the single most invaluable “tool” in my development as an advisor and in my firm’s evolution. They are a top priority in my financial and time budgets.

Yes, the formal educational sessions on the agenda are important, but for me the greatest value in attending conferences comes from the conversations and relationships that follow. More often than not, my Top Conference Takeaways have resulted from “hallway conversations,” whether they happened spontaneously or are scheduled in advance. I always go into a conference with a list of conversations I need to have. Sometimes I’m seeking multiple viewpoints about a particular client situation or practice management challenge, and other times I need to talk to one particular attendee about something that is his or her specialty. I also use conferences as a deadline for due diligence I’ve been wanting to get to—I do my homework in advance and then schedule a face-to-face meeting with the associated investment or software person at the conference.

Conferences are also the venue where I meet the advisors and others (insurance, investment, technology folks, etc.) who are the very people I call on throughout the rest of the year. Looking to improve my rebalancing process? I called on four advisors I expected were doing it better than I was. Need to understand stock options better? I called someone who I trust does that well. We can’t know everything about every topic, but we certainly can identify people who are more experienced or specialists in a wide-range of topics.

For me, attending conferences is an experience of community. Only secondarily are they places to imbibe valuable educational content.

The advisors quoted below in this article have given us a fabulous list of specific tips for making a good conference experience. I do some of those things so instead of reiterating certain points, I’ll just add three others:

- Identify at least one session a day that I will skip in favor of having a focused, high value, scheduled conversation with another attendee.
- Make a point of get outside every day by scheduling walks with other advisors or taking lunch or the hallway conversation outside.
- Always share a room with someone, because it’s a great way to spend extra time with someone I treasure or to meet someone new. And the cost savings helps my conference budget.

Here’s what some other advisors do to ensure a good conference experience.

### Sheila Padden

Attending a major financial planning conference is much like going to Disney World with a young family: you need a plan of attack to get the experience you want.

I try to be mindful as I allocate scarce resources and time to conferences. These are questions I ask myself before choosing to attend a professional event:

- Why am I attending?
- What do I want to get out of it?
- Who do I want to see and talk with?
- Is this my tribe? If not, can I learn and become better at what I do by exposure to this group?

Before shelling out the big bucks, I evaluate content and speakers. Is there a “wow” speaker that I simply can’t miss? Is there a content specialist whose work I rely upon and from whom I could learn a great deal? I make it a



point to talk with that specialist about my most important issue. Chances are that he or she is nerdy enough to want to talk about it too!

I also analyze concurrent sessions to determine which ones are better for live attendance versus those that are suitable for slide review later.

I contact my AICPA buddies and NAPFA buddies in advance to find out who can make it and to encourage their attendance to ensure a fun time! I also look at the list of attendees for people I will be sorry to miss speaking with, and then I make a point of contacting them in advance or looking for them at the conference.

Finally, I map out freebies and networking opportunities. Starting with pre-conference, there’s often a vendor workshop that provides free training (or exposure) to software. The reception the night before the conference begins and dinner opportunities throughout give me time to spend with everyone important to me. Conference breaks offer vendor demonstrations that are valuable opportunities to learn about software or practice standards.

### Brian Carlton

I attack conferences as if I am in new and uncharted waters—a real adventure. That starts by taking a good, brisk walk or jog around the immediate vicinity to get the “lay of the land” and to see how the hotel or convention center is laid out.

At the beginning of each conference, I take one piece of paper (or an e-tablet), and this is where I will write concisely the best idea I obtain out of each session I attend—something I want to act on when I get back to the office.

I try to force myself to sit at tables where I don’t know anyone so that I can make new acquaintances and share information. Same goes with the exhibitors—I briefly say hello to contacts I know, but I still visit new ones to learn and thank them for being there.

The conference is also a great place to get face to face with our brothers and sisters from the home office. By “hanging out” with them, I actually get to know them and see how they are just as passionate about helping people as I am.

## **Sarah Buenger**

The reason I keep attending conferences is that they help me do a better job as a professional on behalf of my clients. They provide one way to stay abreast of changing trends in the industry. Sometimes sessions simply provide confirmation that I’m on the right course, while other times, sessions allow me to identify a different way of doing things that might work better.

Prior to arriving, I identify one or more goals that I intend to accomplish while at the conference. For example, if my firm is looking to change CRM software, I first look at the conference website to see which exhibitors will be at the conference. I review their free demos in advance, and I prepare a list of questions that I wish to ask their onsite experts. After visiting with each exhibitor, I’d also ask colleagues what CRM solutions they use and get their perspectives on the software’s advantages and disadvantages.

Additionally, I look forward to networking and comparing notes with fellow advisors. I come armed with a list of questions and topics to explore with other advisors. I ask how other advisors are approaching these same topics in the hopes of leaving with a wealth of new ideas for both clients and practice management.

## **Stephen Madeyski**

Network, network, network—this is the most meaningful part of the conference. I get a lot of my practice management ideas from likeminded NAPFA conference attendees.

I also make sure to attend sessions that are meaningful to me and that will further my knowledge of the subjects. During each session, I listen to the presentation and intentionally do not take copious notes. Approaching it this way, I am more focused on the presentation’s content. If I feel I want to review the presentation later, I will print handouts or listen to the recorded session when I’m back at the office.

Now, the most important part: the im-

mediate follow-up. On the flight home, I go through my notes and narrow them down to five to 10 action items. There is no way I can follow-up on more than that.

## **Patrick McGinty**

I attended the 2015 NAPFA Spring Conference this year, and my experience was fantastic! I believe that conferences are more about connecting with people than they are about informational content. Informational content can be obtained anywhere today, but great relationships are harder to find.

Here are four things I did in advance of this past NAPFA conference:

- I used the NAPFA Engage platform to organize a pre-conference dinner for young planners.
- I reviewed the attendee list before going to make sure that I could remember the names and faces of friends I had made at previous conferences.
- I made a “dance card”—who did I want to meet? By identifying them in advance, I already knew all the names and faces of the people I really wanted to connect with before I arrived.
- I organized something fun and informal. I arranged an early morning run or workout each day of the conference. This way, I met other people who also enjoy running.

Before the conference had even started, I was meeting people who I was looking forward to learning from, so once I arrived it was a seamless transition.

## **Lesley Brey**

Here’s what I try to do at each conference:

- Review the agenda and slides before leaving for the conference, especially for concurrent sessions. This helps to winnow down the list of sessions to those I really want to attend.
- Remain flexible. Be willing to miss a session or two when I find myself deep in a hallway conversation that is giving me great value.
- Attend as many breaks and social gatherings as possible to converse

with people I don’t yet know.

- Ensure either organized or circumstantial catching up with friends. I have no idea how to ensure both this bullet and the prior one get done sufficiently, though I can feel at the end of each conference whether I accomplished both (for me)!
- Identify a note-taking pattern or procedure that works. I use Evernote and make one note for the whole conference, then email it to myself at the end of the conference for action when I return to the office.
- Use CamScanner to scan documents or handouts I want to keep and email them to myself with a note on how I think it will be useful when I get back to the office.
- Generally immerse myself in the conference experience and fellow attendees. When choosing to enjoy the city—walking around, going out to a meal, visiting a museum—we usually invite others to join in.

## **Melissa Hammel**

When I attend a conference, I am one of those folks who really goes for the CEs. That might come as a surprise to those who know how much I like to sit and visit!

To make it a good conference:

- I make sure to get in early the day before so I can get some rest and sleep well.
- I pretty much stay focused on the conference and don’t do a lot of other work, aside from catching up on my reading on the flights to and from the conference.
- I also make sure I know what I have to get my CE target.. That gives me boundaries around what decisions to make on which sessions. I almost always listen to a few of the presentations for CE credit after the conference, especially when there was a conflict on the schedule.

I learned a tip at meeting I participated in several years ago related to speakers and their styles of speaking. There are times when I am turned off by a particular speaker’s style and/

