

Do You Have A Solid Conference Strategy?

September 11, 2019



Do you have a firm conference strategy? Are you attending conferences with purpose? In today's world, you can find a specialized event on almost any topic. There are numerous conferences falling within the financial services umbrella, which is why it is essential to develop a firm strategy around how to best spend your time at these events. This strategy should pinpoint why you are attending (educational or business development), which conferences you must attend, cost restrictions, speaking engagements, competitor participation, and importantly, where you could find your next client.

Whether you are choosing to attend a conference to win new business or to learn first-hand experience, it is important to vet and ensure the event is a good match for your firm. Being aware of the conference objective in light of your firm's conference strategy will be an excellent way to select meaningful events. We recommend breaking a conference into three categories in order to maximize your strategy: pre-conference, during conference attendance, and post-conference. This can help you make the most of your time out of the office.

Pre-Conference Planning on the front end can save your firm time and money. (Register in advance and book your travel when dates are confirmed. Doing these two things alone are beneficial to cost.) Obtaining past attendee lists, historical sponsors and agendas will allow you to get a feel for the conference. Schedule time to connect with leads and meaningful clients. Do you have a new product launch around the corner? Schedule time with media partners to discuss this exciting news. Use time leading up to the event to promote your firm on social media. Most conferences and events have a social media hashtag that will connect you with other attendees ahead of time. If you are an Exhibitor, getting ahead of the curve could be a game changer for your outcome. Typically, booth assignments are on a first come, first serve

basis. If you are always exhibiting at the same events consider registering a year ahead of time.

Conference Attendance Managing your time during the event can be tricky and hopefully your firm did some pre-conference planning to get your schedule in order. Now that you have arrived, what is next? During the opening day of a conference there are usually kick-off receptions or networking events. Making yourself present at these types of events will continue to maximize your firm's networking efforts, and could get you invited to other off-agenda activities: firm-hosted dinners, golf outings, morning runs and more! Keeping active on social media during the conference will open up additional doors for engagement and potential opportunities while in attendance. The exhibit hall is a useful area to check out your competitor landscape. Who are your competitors in attendance? Who are they talking to?

Post-conference Follow-up is a crucial stage in your firm's conference success. Be sure to connect with clients, prospects and industry peers within a few days of the event with a any follow-ups and takeaways. Also when returning from an event, share what you have learned with your colleagues, mention who you spoke with, hot topics, and if there were any growing areas of concern. Create a measurement tool to compare which conferences are working for your firm and which ones the firm may consider passing on in the future. Upon your return, connect the conference attendees with your marketing team or subject matter experts to assist with future content creation. Perhaps there is a mailing you would like to send out or an e-mail campaign that aligns with topics from the conference? Passing along timely insights to your clients and partners will be seen as a valued resource.

Pick a time annually where your firm can evaluate and strategize about future events. Always have a wish list in case there is any flexibility for an extra conference. Free industry-sponsored roundtables, forums, and webinars are a great way to take full advantage of dollars in your conference budget.

This article is not a solicitation of any investment product or service to any person or entity. The content contained in this article is for informational use only and is not intended to be and is not a substitute for professional financial, tax or legal advice.

[Home](#)