

## THE EVENT CHECKLIST

The following checklist will help you get the most out of any business event where you are expected to meet and connect with prospects and other people to add to your networking universe. Your objective is to reach out, take the initiative, make a positive impression, and your ability to capitalize on contacts and connections will be a key part of your continued career success.

### BEFORE YOU GO

- **Do your research.** Find out all you can about the event, including any interesting and important facts about the location, its purpose, the organization sponsoring and people likely to attend. Think—what is my reason for attending this event—is it a group I wish to join, am I already involved, what is my specific goal for this meeting. Check the website to find out who the organizer is; who is on the advisory board, and what the mission and agenda is.
- **Identify who you’d like to meet.** Think strategically about those attending. Set a goal to research 3-5 people you would like to meet. Also consider calling or emailing ahead to introduce yourself to those hosting or planning the event—you will stand out.
- **Prepare your “intangible tool kit.”** Your “state of mind” to engage fully and productively.
- **Have a positive attitude.** Be ready to engage and enjoy the prospect of meeting new people and reconnecting with those you know.
- **Have self-confidence.** Remember what you have to offer as an expert and successful financial advisor and be proud of the company that stands behind you.
  - Have your 20-30 second introduction prepared for this event. Think, how do I wish to be remembered, what is my ‘headline’ and benefit statement, and why should they care.
- **Have an open mind.** Go to give and learn without any immediate expectations—except to learn, connect, and give away something. Think, there is someone here today that I can learn from and give something away (a piece of advice or information).
- **Be present.** Respect for yourself and others—turn off or silent all electronic devices to avoid distractions.
- **Actively listen.** Talk less and listen more—(monitor yourself not to interrupt and to show you are also listening, remember the color of the eyes of the person you are talking with). Remember names by forming an impression, repeat their name back and form a quick association.
- **Smile.** Have a ready and genuine smile to show your interest and approachability (also a great confidence booster to have a genuine smile).
- **A firm handshake.** Make a positive, human connection.
  - Ears and Eyes—open and ready to connect
  - Your Presence—dress for the event- what is your signature ‘prop’ –appearance speaks volumes
- **Prepare your “tangible tool kit.”** Keep these handy to help you meet and follow-up with ease.
  - **Breath mints** – simple and often overlooked ☺

- **Hand sanitizer** – no need to be compulsive, however you will be shaking a lot of hands.
- **Business cards** – an adequate supply, in good condition, always have them with you.
- **Card case** – take one for your cards and one for those you collect (keep in separate pockets).
- **A nice pen** – an accessory for your image (in fact, carry two in case the ink runs out).
- **A small notepad** – to jot down things you learn immediately after speaking with someone that you will follow up with—for example, their preferred method of communication; what you promised in your follow –up; what you remembered about them.
- **Note cards and stamps** – be prepared with the note cards stamped and you can easily follow up immediately with a quick thank you note to those you connected with. You will stand out with this 44 cent investment plan.
- **Highlighter** – highlight your name tag—it’s a conversation starter.
- **Name tag** – place it on your right side, to be seen as people shake your right hand—the way our eyes naturally look.
- **Mirror** – do a quick pre-check to make sure you look neat, tidy and have a genuine smile and give yourself a quick mental pep talk—I’m happy to be here, I’ve set a goal, I’m excited to learn and connect.
- **Prepare your “opening line.”** Think in advance of what you will say as you meet people for the first time
  - Think ‘open-ended’ questions to start a conversation.
    - What brought you to the meeting?
    - I’m thinking of joining this group. Are you a member? Tell me a bit about what you like.
    - Hello, I don’t believe we have met yet, “I’m \_\_\_\_\_ and you are?”
- **Have a list of “get to know you questions.”** Prepare some questions that help you build rapport as you are connecting and keep the conversation going. From your research in advance about the group and association, you will already have some material to frame your questions.
  - What are some trends going on in your business/field?
  - How would I know if I’m speaking to someone you would like to meet or could possibly use your services or that of your firm?
  - What do you do when you are not working?

You won’t have an opportunity to dig as deeply as the Nierenberg 34 (list of topic and idea generators as you build and grow the relationship). That is for much later as you add some of these contacts into true connections which takes time.
- **Develop a list of “idea generator topics (small talk).”** Become conversant about current affairs, best-selling books, movies, business news, the stock market, and certainly the latest news and trends in the financial industry and your special niche. Keep a running journal of such topic ideas organized by subject so you are always prepared. Everyday read your preferred news medium for general news, industry news, firm news—so you have topics ready to discuss.

- **Prepare a thirty second infomercial about yourself.** Be ready to easily and confidently answer the inevitable question of “What do you do?” Plan positive and interesting “sound bites” and a provocative Value Proposition about you and your company that will get people interested enough in you to get to know you better. Rehearse in front of a mirror or tape yourself until you’re fluent and sound comfortable. Keep practicing and it will vary according to the event, audience, and person you are talking with. The core message will be consistent—yet practice how you can change accordingly. The true goal is to say enough to get interest and then move the conversation to what the other person does. That will help you reframe how you will continue saying what you do.

Reminders as you prepare:

- Who are you?
  - Who do you work with (target market)?
  - What solutions do you provide?
  - What is the benefit you offer?
  - What differentiates you?
- **Set a goal for the event.** Make it specific and strategic to your business situation and needs. Be realistic and know that for your goal to be a reality you have to follow up and take the action steps after the event.
  - **Be ready to take the initiative.** Whether you are an extrovert or introvert, plan to approach others with positive expectations and genuine interest. Besides the people you identified in advance that you would hope to possibly meet—remember these folks to say hello to also—to maximize your attendance
    - Greeter and/or organizer
    - People you meet in line as you are checking in
    - Those in line to get a drink or food
    - Someone standing alone

Remember – you only have to say hello, smile, and be pleasant. You will not have a full conversation with everyone you meet—yet you never know unless you reach out.

## DURING THE EVENT

- **Take a deep breath.** You have arrived, you've done your homework and you're ready!
- **Introduce yourself to the host.** Seek them out and make a personal connection. Again—you will stand out.
- **Get in line.** An easy and effortless way to engage people, whether it's at the registration desk, the coat check or in front of the food and beverage area.
- **Dive in!** Look for a group or two or more that's smiling and engaged; say hello and engage. Walk up to a group of at least three people—when it is just two people, they are already deep in conversation.
- **Start a conversation with your dinner partner.** If there is a meal involved, talk to those on either side of you, and even across the table when it is feasible. Make a point to sit with new people.
- **Make connections and a plan to follow-up.** Have a goal to learn something about each person you meet and create reasons to follow-up and start building a rapport and hopefully a relationship.
- **Listen and learn.** Ask about the other person first ... remember that true networking is about giving without concern that you will get something back. Make a point to actively listen and you will learn something new and useful. Listen with your eyes and ears, don't interrupt and jot down later what you learned. (I am amazed about the information I pick up when I least expect it.) Be sure to ask them 'what they do'—people love to talk about themselves and their interests and you will be remembered as a good conversationalist because you listened.
- **Find preferred methods of communication.** Every busy person has a preferred method of communication. Ask, 'what is your preferred method of communication for us to connect?'
  - Email, Telephone, Text

Remember one size does not fit all—make it easy for the person to reply to you when you reach out. Ask them in advance.

- **Have an exit strategy.** At events, everyone wants to talk and mingle. If you have made a concrete connection, you will have your agenda to follow up—when and how. To diplomatically disengage at the event—depending again on—if you are going to follow up or it was someone you only talked with briefly at the event:
  - It was great to meet you and I look forward to continuing our conversation. As you mentioned, I will follow up with you \_\_\_\_\_ (when they told you to follow up) and via \_\_\_\_\_ (their communication preference).
  - It was great chatting with you—enjoy the rest of your time here.
  - I'm very glad we met. Continued success and if I have an opportunity or suggestion for you, I will definitely be in touch.
  - My time has already been well spent—I'm glad we had a chance to meet.
  - I look forward to seeing you at another event. Thank you and enjoy the rest of the meeting.

### **AFTER THE EVENT**

- **Within 24 hours, send an email and also for those you really wish to start the connection.** A simple hand written note, simple and sincere, stating your pleasure at meeting them, appreciation of their time and any information you promised to send.
- **If you promised to send materials, do so immediately.** Many people say they will do something after an event, those who actually follow-up promptly will always stand out. Send only what you promised—less is more—you will have time to bring more as you deepen the connection.
- **Call or email within two weeks after the event to suggest a meeting with those that said they would enjoy the next step.** Be strategic in your follow up. If there was interest in further contact after the event, be the one to follow-up with something specific, suggesting an activity, time and place.
- **If a contact of yours provided you with a referral, be ready to tell them of follow-up and results.** Polite and smart business practice to let people know what happened, to keep them in the loop, next steps and, of course, a sincere thank you for the connection and introduction.

**Remember the ‘event’ is only the starting point. To build strong connections into your universal network—it is about taking the next steps to build on the relationship and to do so consistently.**