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Practice Advancement Program

Conference Attendee Strategies
Creating a Comprehensive Playbook

Course Description

Make the most of your next conference by organizing every detail—from travel logistics and session notes to networking contacts and post-event follow-ups — in one streamlined, accessible space. In this session, you'll learn how to leverage the power of Microsoft OneNote Desktop to consolidate your planning, capture ideas in real time, and execute your next steps with clarity and purpose.

This class introduces a structure that helps you capture, prioritize, and act on what matters most—before, during, and after the event. With everything organized in advance, you'll arrive prepared and return empowered, ready to turn ideas into impact without missing a beat.

Set yourself up for success with a clear mind and a clear plan.

*NOTE: The strategies in this class are demonstrated using Microsoft OneNote Desktop, but a similar structure can be created in other technologies.

Syllabus

Part One – Learning Best Practices for Setting Up a New Notebook
- Determining the Proper Location for the Notebook File
- Brainstorming Layout and Organization

Part Two – Identifying Conference Objectives and Strategies
- Top 2 Objectives
- Breakout Session Strategy
- Exhibit Floor Strategy
- Community and Relationship Strategy
- Evening and Socials Strategy

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Part Three – Capturing Key Takeaways and After-Conference Actions
- Capture tools for staying in the moment (e.g., Tags, Tasks, QuickNotes)
- The FOUR 3's
- Creating an After-Conference Action List

Part Four – Strategizing Effective Team Collaboration
- Sharing the Conference Notebook
- Divide and Conquer vs Buddy System
- Team Collaboration Strategy

*This course is well-suited to anyone who attends Scaling New Heights and other conferences

**PREREQUISITES: None