



8 Point Conference **PLAYBOOK**

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[Let's Get Started](#)



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8 Point Conference Playbook

Table of Contents



- 01** Pre-Game Warm Ups
- 02** 1st Quarter
- 03** 2nd Quarter
- 04** Halftime
- 05** 3rd Quarter
- 06** 4th Quarter
- 07** Overtime
- 08** Post-Game Conference

The PRE-Pre-Game

Prepping is VITAL to having a successful conference. Before you get into Pre-game mode, you must as a company, know the answers to the questions below.

What are the company's goals & what does "Success" look like for this event?

- 01** Revenue (Event to 90 days post-event)
- 02** Meetings (Scheduled-Completed)
- 03** Designate all accountable members (Responsibilities, roles, & targets)
- 04** Non-Competitor meetings/ relationships established
- 05** Documentation (CRM & Leadership Reporting)
- 06** Internal meetings (Before/ After event)
- 07** Follow-up processes-hand offs





Pre-Game Strategy (cont.)

01 Analyze the agenda to see what times make sense to schedule meetings.

A Breakfast (High-level targets)

B Coffee (Mid/ High-level targets)

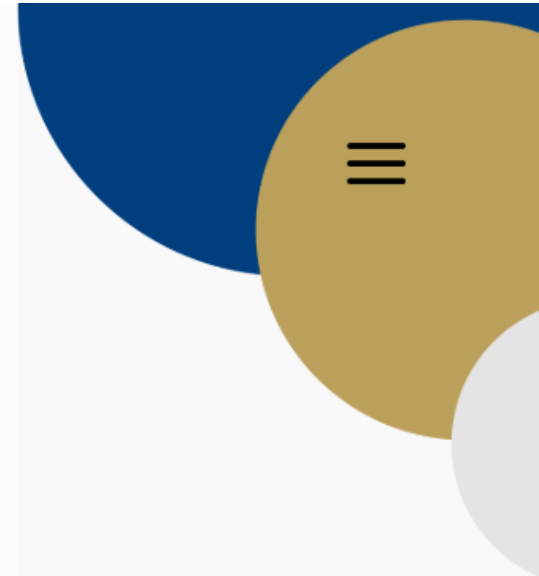
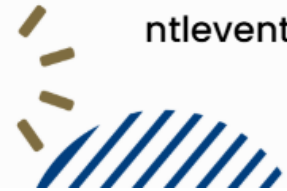
C Lunch (Mid/ High-level targets)

D Drinks (Mid/ High-level targets)

E Dinner (High-level targets)

02 8-12 weeks out, start securing dinner reservations. Keep parties between 4-12, as larger parties hurt networking opportunities and greatly lengthen the dining experience. BE STRATEGIC & Look at potential partners

03 6 weeks out you should start emailing your High-Level Targets. Letting them know you are attending and would love to meet up with them while you're in town. This is where you want to set up the lunches and dinners. If they don't have availability, try to fit them in any of your available time slots.





Pre-Game Strategy (cont.)

04 4 weeks out start to hit your Mid-Level targets while still pursuing your top targets.

05 Be creative with ideas for your Top Targets

- A** Send them official dinner invitations
- B** Starbucks gift cards
- C** Offer donation to their firm charity in exchange for a meeting
- D** Invite to your sponsored event
- E** Crumbl cookies

06 Make LinkedIn requests for every High-Mid Level target including following firm.

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Pre-Game Strategy (cont.)

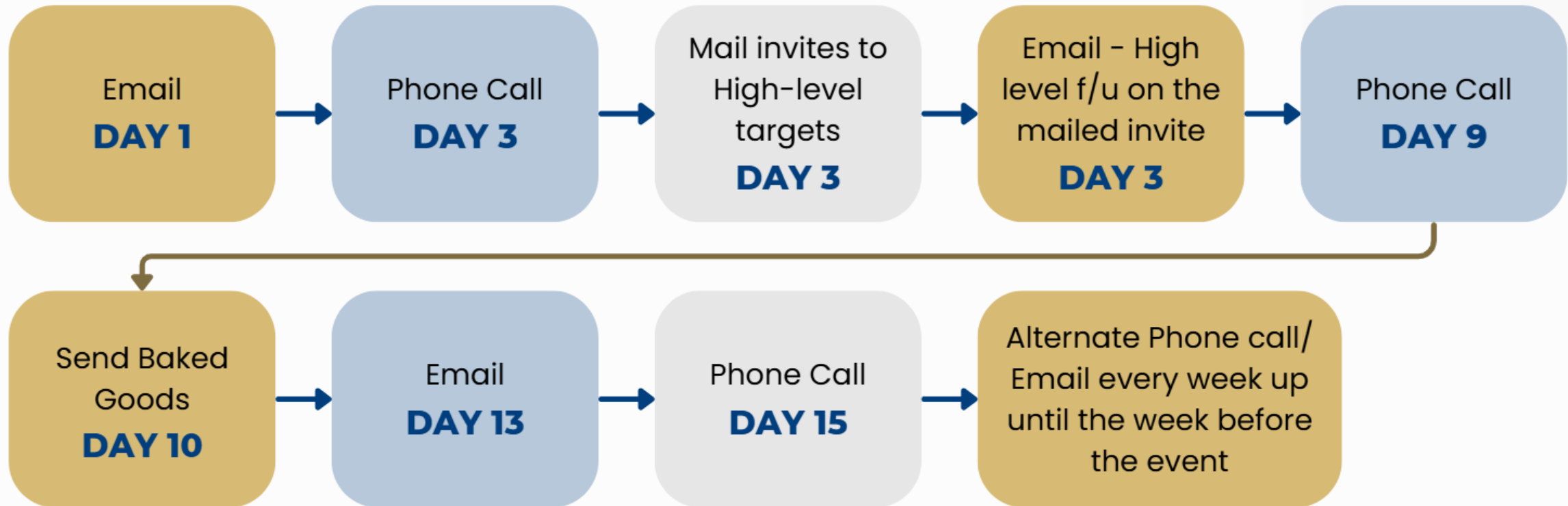
07 Create a “Facebook” for your top 30 targets. This will include:

- A** Profile pic
- B** Name
- C** Firm
- D** Position
- E** Practice Focus
- F** Recent Successes / verdicts
- G** Mutual LinkedIn connections

08 Start Conference Contact Cadence



Conference Contact Cadence





Pre-Game Strategy (cont.)

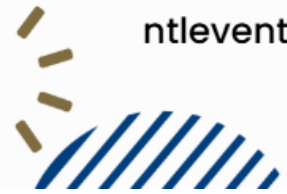
- 09** When **pre-event attendee list** is available make sure you assign the ones not in CRM to the sales consultants. Research them and see which ones may be High/ Mid level targets. Use the Conference Contact Cadence to schedule meetings.
- 10** If you get the meeting grab their **CELL PHONE number**
- 11** MAKE SURE when scheduling your appointments, do not schedule back-to-back. Give yourself 30 minutes in between, to allow for lateness or just going over.
- 12** Create a list of vendor targets and schedule meetings with them in between your attorney appointments.



Pre-Game Strategy (cont.)

13 Study the area and venue. You want to make sure you know the coffee places, bars and restaurants in the hotel and conference location. Also knowing these types of places very close to the conference location is important.

14 **Research the speakers!!! Make sure you try to connect on LinkedIn and thank them via email after they speak.**



Keys to Networking

- When attending networking events, come with a plan and strategy.
- Have relevant conversation starters
- Ask questions about them
- Once engaged, introduce them to any of the attorneys or vendors in your network to strengthen their network and build confidence in you
- Leverage your existing contacts to secure face time with your targets
- Networking is not selling. It's building a connection that earns you the opportunity to talk about your services
- Document everything and add these notes to their contact profile in your CRM





1st Quarter Strategy

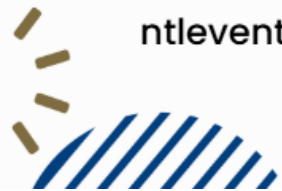
Game On!

- It's game time – the First Quarter has kicked off
- The first day in town marks the start of the conference
- Energy, preparation, and strategy matter from day one
- Keep your ear to the ground on daily/ night gatherings not on the agenda

**Work Your
Connections**

Pace Yourself

**Document
Everything**





2nd Quarter Strategy

Be “Clark Kent” First

- Go into meetings focused on listening and learning
- Don’t try to solve everything immediately
- You can’t be “Superman” without the facts

Learn Before You Solve

- Your role is to:
 - Learn about them
 - Educate them on you and your company
- Solutions emerge only after you understand:
 - Who they are
 - Their goals
 - Where they need help



2nd Quarter Strategy

Conference Mode: Assess, Adapt & React

- Once the conference starts, flexibility is critical
- Plans will change:
 - Sessions may run late
 - Priorities may shift
- Stay agile and proactive

Expect Changes – No Excuses

- Meetings may be cancelled or rescheduled
- A change in plans is not lost time
- Always have a backup plan



2nd Quarter Strategy

If a Meeting Falls Through – Take Action

- Reach out to other high- and mid-level targets
- Don't let gaps in your schedule go unused

Leverage Sessions

- Attend sessions, especially hot-topic discussions
- Take extensive notes on content, keynote speakers, & attendees



2nd Quarter Strategy

Be Visible and Proactive

- Roam the halls and look for attorneys on your target list
- Offer:
 - Coffee
 - Lunch
 - Drinks
 - An invitation to group dinner

Use the Exhibit Hall

- The exhibit hall is a high-value networking zone
- Network with Existing Vendor Contacts and Potential New Partners
- Take notes on:
 - New Technology, Competitors, & booth and promotional ideas that seem to hit or miss

Halftime

Halftime Reset

- Pause, breathe, and re-center
- Evaluate Day One performance
- Adjust your approach as needed
- Capture key learnings and any new high-value targets

Share Insights & Track What's Hot

- Connect with coworkers to share what's working
- Keep notes on conference buzz:
 - Hot new litigation
 - New vendors
 - Competitor pricing
 - Industry rumors
 - Events attorneys are excited about



3rd Quarter Strategy

Full Speed Ahead

- After halftime adjustments, push through the next full day
- Network at every opportunity
- There is zero downtime at these events
- Remember the wise words of Ricky Bobby: "If you ain't first..."





3rd Quarter Strategy

Be a Connector

- Introduce new people to:
 - Established attorneys
 - Trusted vendors
- This positions you as a true consultant and value-add

Expand Your Network

- If you see attorneys or vendors you know talking with someone new:
 - Go say hello
 - Get introduced to the new contact
 - A simple introduction can open big doors
 - Exception: Don't do this if the new person is a competitor



4th Quarter Strategy

Final Night – Finish Strong

- You made it – be proud
- This is the last full night, but there's no slowing down
- Focus on:
 - Closing deals
 - Or setting deals up to close next week

Lock in the Next Steps

- Set appointments for the following weeks
- Be sharp – many attendees are winding down or only attending a quick session the next morning
- Momentum matters



4th Quarter Strategy

Prep for the Final Morning

- If you don't have morning appointments:
 - Book a few, even with partner or potential vendors
- Prepping ahead creates last-minute opportunities

Prioritize Target Law Firms

- The final morning is your last chance to “bump into” key targets
- If you do secure a meeting on the same day:
 - **Research** as much as possible before the meeting
 - **Reschedule** any conflicting vendor meetings, they will understand as attorneys take priority

Overtime

Keep Pushing

- Applies to every part of the day – morning or night
- Final night may call for burning the midnight oil
- Stay in your comfort zone while networking
- Early morning meetings: breakfast or coffee with attorneys

Maximize Every Opportunity

- Attend popular morning sessions if needed – great for "chance" encounters
- Conferences are a privilege: work hard, play responsibly
- Document everything – let your company decide what's valuable
- Don't sacrifice the next day recovering from late nights



Post-Game Press Conference

Keep the Momentum

- Congrats! You made it through the event!
- **Follow up** with everyone you met: attorneys and vendors
- **Schedule meetings** to turn connections into opportunities
- **Attend popular sessions** if needed – great for chance encounters

Document & Reflect

- **Document everything** – your company decides what's valuable
- **Coffee is for closers** – stay on top of your follow-ups!
- **Reflection:**
 - What went right?
 - Areas of Improvement?
 - Ideas for your company's next event





THANK YOU

We appreciate your time and engagement today.

SEE YOU AT THE EVENT!

