

Business Development-Focused Checklist for Speaking Engagements

The following checklist will help you maximize the business development value of your speaking engagements before, during and after the event.

Goals

- Gain visibility
- Build your credentials
- Deepen relationships with your network
- Develop new business

In Advance

- Ensure you have cleared all potential conflicts — in terms of timing, your topic and the organization to which you are presenting
- Inform Marketing Department about event
- Calendar deadlines and milestone dates
- Understand anticipated audience demographics/ ask event host for registration list
- Ensure your presentation is tailored to the audience with industry- and/or role-specific examples
- Add your contact info and QR code hyperlinked to your LinkedIn profile to slides
- Plan a follow-up piece that can be shared with attendees who connect with you during event
- Ask if presentation will be recorded and available to speakers
- Bring a back-up of your presentation on a personal laptop and/or USB drive
- Practice your presentation

Promoting the Event in Advance

- Ask host for any available event marketing materials (e.g., logos, artwork, hashtags, links, invitations and social media templates)
- Prepare any relevant press materials (e.g., calendar of events write-up, invitations/backgrounder for journalist attendees, etc.)
- Plan and prepare social media and website posts (tag co-panelists and host organization)
- Posts: At least 3 days before early bird registration deadline and before final registration deadline (adjust lead time for destination/travel events)
- Prepare short video clips for social media promoting your topic
- Share registration discount codes with contacts, if offered
- Send print and/or email invitations to clients, prospects and referral sources, including personalize notes or phone calls for key contacts
- Schedule on-site meetings with key contacts: clients, prospects, journalists, etc.





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Speaking Engagement Checklist (cont.)

During the Event

- Collect business cards, making notes about conversations or promised follow-up activities
- Stay engaged during networking breaks
- Connect with other event speakers
- Thank sponsors/exhibitors for their support
- Take pictures
- Share activity on social media

During Your Presentation

- Ask someone to take photos of you speaking
- Avoid getting trapped behind podium or table
- Engage your audience with polling or responses
- Consider offering giveaways to encourage audience input or questions
- Reference the keynote session or prior speakers to build on conference themes
- Invite the audience to connect with you via LinkedIn (using QR code in slide deck) or via email
- Offer your follow-up resource to those who express interest (e.g., leave a business card or request via email)
- Stay after to answer individual questions from audience



After the Event

- Ask host for final attendee list, if available
- Add new contacts to LinkedIn and firm contact management system (including newsletters), noting first contact at the specific event
- Coordinate your follow up, as appropriate:
 - “Glad to see you at event” notes
 - “Sorry we missed each other” notes
 - “Thank you” notes to co-presenters and host
 - Forward follow-up resource to presentation attendees who expressed interest
 - Calls with key contacts
- Debrief with your marketing team or colleagues on the quality of event, contacts made, visibility delivered and whether it’s worth participating in future years
- Review session recording to improve future speaking delivery
- Promote on-demand recording availability, if appropriate
- If permitted, edit small slices of presentation recording for social media clips, website usage or samples for future speaking proposals
- Draft blog post with key event/presentation take-aways and share via website and social media
- Add presentation to website and print bios and social profiles

