



AAMGA 2009 Annual Meeting Productivity Tips: How to Maximize Your Experience

1. **Prepare - Determine who you need to see and lay out the existing and future opportunities or challenges you would like to address.**
 - Check with your staff to find out what issues they have with the Company or Vendor - both good and bad.
 - Look for opportunities for new business. Prepare a high-level summary of the new business options for presentation. If your business partner is interested, you can follow up with additional details after the meeting.
 - Remember, the hallmark of the wholesale insurance marketplace is the strength and respect of mutual relationships. The Annual Meeting is the perfect venue to foster existing relationships and making new contacts in a professional and relaxed atmosphere.

2. **Plan - Schedule your time judiciously, so you can accomplish all of your goals.**
 - Start developing your schedule now, before the conference, to arrange meetings with those who will be in attendance. Meeting delegates are listed on the AAMGA website and updated each Friday as registrations are received. If you do not see the person with whom you'd like to meet, call them to advise you'll be at the meeting and would like to schedule some time with them.
 - Most Companies and Vendors will fill their schedules quickly. The Agents and Brokers Lounge will be full this year. Along with your meeting request, send an agenda ahead of time. This gives the people you will be meeting with time to touch base with their staff and get the information they need to address opportunities and solve any problems prior to your meeting.

3. **Participate - Milk the meeting for every benefit you can.**
 - Make plans to participate in as many activities and meetings as you can while you are in Boca Raton.
 - The Opening Reception on Sunday night is an excellent way to touch base and renew old friendships.
 - The Vendor & Trade Show will be open Monday from 10:00am to 5:00pm. The wholesale insurance community's premier vendors, companies, and solution providers will all be present to meet with you and expand your capabilities, opportunities and prospects.
 - The Agents and Brokers Lounge will be open at all times throughout the Annual Meeting, and is a perfect venue to conduct business.

- The UFO reception will allow you to meet the best and brightest young professionals in the market, and to network with them as well.
- The AAMGA University will have a booth at the Trade and Vendor Show to provide you with information on continuing education and professional development classes being offered – in sessions across the country, as well as the AAMGA’s new on-line education center. Classes can also be arranged in your offices for employees and customers.
- Use social functions to develop contacts. You can begin, establish, and maintain relationships that prove invaluable. That way, whenever there’s a question or issue, you can pick up the phone and call someone you had coffee with, visited with, or had dinner with over course of the Annual Meeting.
- Attend the educational sessions on Sunday or assign other staff members to attend. Not only do they provide a great “take-home” value, but the sessions can help you to be more profitable, aware, and a better insurance professional. Share what you’ve learned when you get back to the office.
- Attend the Opening Breakfast Monday morning and the Business Meeting on Tuesday morning. Glenn Reynolds and Steve Forbes will share their personal views which will also provide you with a better understanding of the issues, and the opportunities we have to improve the current environment in business.
- Have some fun – join us for the Gala Banquet Wednesday night with comedian and Monty Python alum John Cleese. It will be a great way to end your time with your AAMGA colleagues.

4. Persist - Take the initiative when trying to meet with Companies and Vendors.

- Don’t be afraid to ask. Remember the old saying “don’t ask, don’t get?” If a company doesn’t call you and you want to meet with them, take the initiative and call them. If you initiate a brief meeting at the Annual Meeting, most of the attendees will try to accommodate you. They may not physically have the opportunity to meet with you at the moment you approach them, but most will do what they can over the next 3 or 4 days to connect with you.

5. Plunge - Go to the Annual Meeting of the Wholesale Insurance Marketplace, and give it your all.

- Take the plunge. You are only going to find out what you’re missing by going to the Meeting yourself. If you commit a couple of days, it’s not the most, nor the least expensive thing you will do this year. However, it will be the most important. Frankly, you cannot afford to miss this year’s Annual Meeting. If you have never attended, use this year as a trial. You are sure to find at least one good idea that you can apply to your business that pays for the trip.
- And speaking of plunges...be sure to take a look at – or a dip in – the newly renovated pools that debuted this year at the Resort!

6. **Pick up - Review, process, and follow-up after the conference.**

- Review meeting notes and session handouts.
- Make a list of follow-up actions you need to take.
- Give the people you met with updated contact information for the appropriate person at your company to follow up with and give the reciprocal information to the person at your company.
- The proper people need to be involved to make the right things happen after the meeting.
- Bring along a lot of business cards.
- Enter business cards received from the new contacts into your filing system for easy retrieval; don't forget to notate how you met them and when, as well as personal information about the person with whom you met. It's a great way to respect a person's family members, hobbies, and other interests, when speaking with them again in the future.
- When appropriate, share what you learned with other staff members.