

CPA Australia Podcast – Transcript

Episode 28: Are you getting the most out of attending a conference?

Intro: Hello and welcome to the CPA Australia Podcast, your source for business, leadership and public practise accounting information.

Jillian Bowen: Hello everyone and welcome to another episode of the CPA Australia Podcast. I'm your host, Jillian Bowen, and I head up the content and social media team here at CPA Australia.

In today's episode, we're getting the inside scoop on how to make the most of attending a conference with Rob Thomason, the Executive General Manager Education at CPA Australia. Rob heads up an extensive portfolio for CPA Australia, including the CPA Program and its flagship event, CPA Congress, which takes place in cities across the globe every year.

Rob, welcome to the CPA Australia Podcast.

Rob Thomason: Thank you.

Jillian Bowen: CPA Congress brings together some of the biggest minds like Jason Wheeler, the former CFO of Tesla in the US, and Matthew Luhn, an original storyteller with Pixar Animation Studios also in the US. It's also packed with expert advice and insights on the issues and trends that people are experiencing right now, and the technologies and techniques they need to take advantage of in the future.

Before we dive in to today's topic, tell me a bit more about why you love being a part of bringing a global conference series to life.

Rob Thomason: Conferences are a lot of fun. They're a lot of fun for the people who actually organise them, and they're a lot of fun for the participants. They also have to deliver on learning. And my career for 35 years has been involved in learning, whether that's an MBA, or whether it's an executive education, or whether it's a webinar or a podcast. I've always been involved in learning. What I like about conferences is that it's a bit like an LP record. Some of you might be too young to remember that, but it's a piece of vinyl. When LPs were all the rage, the producers would spend a lot of time working at how to order an LP so that the songs appeared in the right order and built to a crescendo, which was the middle of the LP, and then finished with a bang, which is the last song on the LP. That's what we try to do with the conference. So a conference is all about curating a range of speakers so they will present an absolutely ideal learning environment for anybody who is attending that conference.

What I enjoy about bringing this all together is that we, at CPA Australia, we have a whole range of skilled product developers who work very closely with our members to identify the best speakers and again, to deliver the content that

we need, to deliver all the learning objectives of the conference. We've got fantastic event coordinators to make sure that your experience on the ground is a wonderful experience, and that you'll walk away from the conference remembering that you've had a great experience at that conference. We have a whole team of marketing and comms people that do everything from podcast, like this one that you're listening to now, through to videos, through to direct mail, to make sure we get the right participants along to the conference; to make sure that all of our members understand what they are going to receive from the conference; and to make sure that anybody who's not a member, but is also interested in that content, understands what's going to be presented in the conference.

I guess finally, what I enjoy is actually walking into a keynote session. I usually stand at the back, and I see that the speaker is on the stage, the AV is working, the participants are all engaged in what's happening, the lighting is working, the buzz of the room is all there, and that's bringing all together. A year's work goes into congress, and in that few moments, that's where it all comes together, and that's what I love.

Jillian Bowen:

I have to admit, I'm really looking forward to being part of it too, particularly this year, as we're going to have a number of the Congress presenters joining us on the CPA Australia Podcast. So it's a great opportunity for me to both see them in the room, and then chat with them here on the podcast afterwards.

Let's jump in to today's topic, which is all about getting the most out of attending a conference. A lot of people say that this actually begins well before the event itself. So I'd like to start with your thoughts on how people should actually choose a conference that they're going to attend.

Rob Thomason:

It's really important to choose a conference that's going to meet your needs. I said earlier about the curation of our conference comparing it to a vinyl LP. You see there's a lot of conferences on the market. There are conferences for just about anything you can possibly have to imagine. Some of those are run by professional associations like CPA Australia. Some of them are run by commercial organisations. Let me tell you, we put a significant amount of work at CPA Australia, working with our members, working with Divisional Councils, working with our board, working with our senior executives to make sure the conference we put together, the Congress that's presented to you is the best possible curated learning conference that you can find.

Associations tend to focus very much on the value that they're delivering to their membership and to non-members who are also interested in this area of learning. The commercial presenters tend to find eight speakers per day, so a two-day conference, so far 16 speakers and those 16 speakers will not be curated in any way, shape or form other than they have availability to be at that conference at that time.

So when you're looking for a conference, my advice to you is to first of all, look at your associations. Look at CPA Australia. Look at other associations you may be involved with. They are the ones who are going to try to deliver a better value to you. Number one is pick your conference well.

The second point is what do you want to get out of it. What are your expectations in terms of learning? You really need to put a bit of thought into this because you're going to spend a bit of your time, you're going to spend a bit of your organization's time, you're probably going to spend a reasonable amount of money from your organisation or out of your own wallet, so you need to think about what you are wanting to get out of it.

You need to be thinking about new ideas about products. Are the speakers going to talk about products, or are you going to be relying on the exhibitors. If you're looking for exhibitors, you want to see how many exhibitors are going to be at a particular conference. You need to be thinking about the content. What do you want to hear about? And what do you want to actually take back to your workplace? Is the conference going to deliver the sort of content that you might seem interested in? And are you thinking of change in your organisation. Again, if you are thinking about change, you need to be thinking about who are speakers who can present to you some ideas about some change that they might have introduced in their careers.

Jillian Bowen:

There's so much to do there, and to think about. The one thing that we haven't talked about yet though is ultimately, who's going to let you go? Now in many cases, as you said it's an investment in time, it's an investment in money, often that means a manager's approval. Do you have any advice for our listeners on how to actually make that happen?

Rob Thomason:

Conferences are seen as being an expensive investment of time and money by organisations, by your bosses, by your bosses' bosses, they're all going to have a view about whether a conference is delivering the best value in terms of their learning and development or training budget within an organisation. First of all, it's being very important about what your expectations are. When you're going to talk to your boss, you have to be very clear about what you're hoping to get out of a conference, and what aspects of that conference are actually going to deliver on your expectations. You also need to be thinking about what you're going to bring back to your workplace. If you're thinking about a change or introduction of a new process in your organisation, you need to be thinking about how this conference will actually help you deliver those changes.

I will also suggest you think about your next job. Depending on your relationship with your boss, you may or may not want to talk about that, but you should always be thinking about where is the knowledge that I'm going to get out of this one, two or three days investment of my time and the organization's money. Where is that going to get me in the future in terms of my career path. So always be thinking about your next job.

I think it's really important, as a final point, we are probably accountants, we're talking about finance, we're talking to finance leaders. Think of the return on investment. What's the return on investment you're going to be able to deliver to your organisation and to your boss?

Finally, on our website, if you're thinking about CPA Congress, there's a whole section on how to convince your boss. It's important because your organisation is not going to make an investment in you unless they're convinced that you're going to be able to make an investment back into the organisation

Jillian Bowen: Great suggestions, Rob. Okay. We've got it across the line. We've got endorsement for attendance from the boss. But then does it stop there or is there more preparation people can actually do at this point?

Rob Thomason: Yeah. Before you attend a conference, I think it's important to get back to your expectations. Start thinking about what it is that you're hoping to achieve. Have another hard look at the conference programme there. Don't wait till you get onsite and say, "Wow! What am I going to attend?" Start thinking about the areas or the speakers that you want to hear. Most conferences they have a range of concurrent session, so you've got to make some choices. Think about the speakers you want to attend and listen to at those concurrent sessions. Think outside the box. Don't just go to areas that are going to be paralleled or aligned with your work. Think about other areas where you might never thought about other activity within your organisation or within your career. These speakers in areas that are not aligned with your day-to-day job are the ones that will provide probably a novel solution, they'll provide different ways of thinking for you to think about particular problems you've got. So think outside of the box on that one.

Most conferences have a conference app. Certainly, CPA Congress has a conference app. Have a look at that app. That will give you some more intelligence around the speakers and to start to think about those speakers again. On the app, most apps you have an opportunity to register your name and your interests, so this will help with networking as well. We'll talk a bit more about that shortly, but there's great opportunities for networking at conferences.

The big high profile speakers. Have a look at who they are. Have a look at what they've already said. A lot of speakers you find on YouTube, have a look at what they have to say on YouTube. That won't be exactly what they're saying at CPA Congress, but it is along the lines of what you could expect to hear. Think about what they are talking about, and how that might apply to your own workplace. You might want to read some articles. A number of our speakers at CPA Congress have produced books. You might want to have a look at those books before you go. This will help you focus on what you want to achieve and what you want to hear from the speakers.

You can start to begin your network; I mentioned the app. There might be people that you want to get in touch with. There might be people from your organisation. You might find people you studied with. You can start that networking before you arrive at the conference.

And finally, have a look at the exhibitors. What are the new products that those exhibitors have got? What are the things that you might be able to find out about before you get to the Congress. You can actually ask the exhibitors quite intelligent questions about their products that they've got available for you at Congress to have a look at. There's a lot of things you can start thinking about before you get to Congress, and I'll encourage you to do that.

Jillian Bowen: Great points, Rob. I know personally that I often get quite excited by a keynote. They tend to be the celebrity speakers, for example, Matthew Luhn, who's coming out from Pixar. You look at that and you go Pixar, we all know who they are. That's going to be amazing. But then as I take my time and actually delve in to the concurrent sessions, that's where I often find the gems that I'm really going to be able to apply in my work down the track.

Rob Thomason: That's right. The concurrent sessions cover an enormous range of topic areas. As I said before, think outside of the box here. Don't just focus on the ones, "Well that person is really aligned to my thinking, or that person is really aligned to my day job." Think about somebody that doesn't align exactly with what you do, because that's where you find some really exciting new information.

Jillian Bowen: Great. Now jumping forward to the big day, the start of the conference. Let's talk about some of the practicalities. Going into a session, any advice for people on what they can do to really get the most of taking something away from each session.

Rob Thomason: Yup. Thanks, Jillian. Remember as you're going into each session, the better adept to these sessions. You've already been thinking about the conference. You've convinced your boss that you could come along. You've developed your own learning objectives. As you walk in to that room, just remind yourself of those learning objectives. You don't need to have them written down. Let's not be too formal about this. But you have to get yourself in a space ready to listen to the speaker. It's being present. It's actually turning your phone off unless you're doing Twitter; that's something I don't do, but turn your phone off or turn it to silent. Make sure you're not looking at your emails. Think about your learning objectives. Think about what you're hoping to hear from that speaker, and be present in the session.

At the conference, pace yourself. You should be looking to get the best experience out of a conference. That doesn't mean you have to attend every session. I'll encourage you to attend every session, but you might want to talk to some exhibitors as well. And you might meet people that you want to network with. Give yourself space to think about what you're hearing at the Congress.

It's interesting, when I've been to a number of conferences in the US, people in the US will start listening to a speaker and then decide within the first, five or ten minutes they don't like that speaker, they'll get up and walk out and go to another session, we are too polite I think in Australia to do that. But be bold. If the person that you're listening to isn't delivering what you're hoping to achieve, then have a look and see where you might go to another concurrent session, so that you're making the best use of your time at that conference.

Listen to the speakers, I've said. Be prepared to ask a question if there's something, if you thought hard about your learning objectives, if you've thought hard about what you want to get out of the speaker, and you've done some research, if the speaker doesn't address the areas that you want to have addressed, then ask a question. It's not too hard. In CPA Congress, most of our keynote sessions, you can ask a question on your phone, through the app. That doesn't mean you have to get up in front of a whole crowd of people, and articulate what you want. You've got time to think about that question.

I always reckon that when you go to a conference, if you get one or two great ideas out of each session, then you've actually made the investment worthwhile. Jot down your one or two great ideas, and we'll come back to those a bit later in the conversation. Be present, be ready for the session, and really focus on what you want to get out of each session.

Jillian Bowen: I really like your advice about having the courage to say, "This isn't for me." You're right, Australians, in particular, can be quite polite about that. We're quite a bold culture, generally, but we're very polite. One of the things I found that if I'm a little bit in doubt about a session is that I'll just simply sit towards the back, so if I do want to slip out, it's not quite as obvious as being in the front row, and everyone can see me stand up and walk away.

Rob Thomason: Yeah. The conferences I've been to in the United States, probably 10 or 15% of the population will change in the first 10 minutes. It's quite extraordinary. It's quite a buzz in that first 5 to 10 minutes so speakers, they have to get on song very, very quickly, because if they're not focused on what they want to say, they'll lose the audience.

Jillian Bowen: You also mentioned networking, which I think is a really great part of the conference experience. It can be a challenging part. But I have heard a lot of people say that there's just as much value in the hallways at a conference as there is in the sessions. Any suggestions about how conference attendees can make the most out of networking?

Rob Thomason: Yeah. CPA Congress, we will have in most of the Eastern states, probably 1,000 people present. That's a lot of people. In the other states of Australia, or in other locations, quite a few hundred at each conference. There's plenty of people to mix with.

Number one, don't spend all of the time with your mates. It's very easy when you go to a conference to spend time with people you know, your colleagues from work, people that you might have studied with, and that means that you're not getting to speak to other people. You're not getting new ideas from other people. It's tough going out and making yourself known to other people. I suggest that one of the other ways of thinking about this when you're getting ready for a Congress, is to think about what's your elevator pitch? What's your two or three sentences that you can talk about when you're meeting somebody for the first time? "Hi, I'm Rob. I'm Head of Education at CPA Australia. What do you think of this Congress?" Something like that. It's short, sharp, and it gives somebody a lead in to answer a particular question.

Another tip is to arrive early. This might sound counterintuitive, but if you're feeling a bit anxious about meeting people, if you don't like breaking in to a circle and trying to create a conversation with a new group of people, if you arrive early, and you're seen to be by yourself, I bet my bottom dollar, someone will come and introduce themselves to you. Be there early. Be ready for that. And be ready with your elevator pitch.

Those networks are really important. You might have already identified people you want to network with through the app. If that's the case, then you send a message through the application, and identify somewhere that you might like to meet. You might meet at the registration desk, or meet at a particular coffee station, or meet at a particular exhibitor stand. There are ways to identify the geographies in a Congress environment. Try to do the networking because that will just add another dimension to your Congress experience.

Jillian Bowen: I think that advice is particularly helpful for the introverts out there, because it can feel really intimidating turning up particularly if you're on your own. Being on your own at a conference and being an introvert, I think that's fantastic advice. Because sometimes in a crowded room, people can't tell that you're on your own. So turning up early, excellent tip. Thank you.

Rob Thomason: And if you are introverted, it is often hard, but if you've got a couple of lines sorted out in your mind, what are the things that you want to say about you, and a couple of questions to get the conversation going, that's all you need. Then you'll find, even if you bump in to another introvert, you'll find if you've got a few questions that you'll start a conversation very quickly.

Jillian Bowen: Absolutely. I always find that one of the interesting opportunities is actually by spending some time around the exhibitors, because A, they kind of have to speak to you, and B, other people who are on their own tend to come around and look for opportunities to have a chat. Tell me a bit more about what you can get from visiting the exhibitors at a conference.

Rob Thomason: Exhibitors are really important to a conference. They add a whole new dimension to the conference. If you think about your experience at Congress or at a conference, it's all about the content, so what you're hearing from the

speakers; it's about the networks that you created to people that you meet; it's often about the social activities. At CPA Congress we don't have a lot of social activity, but in some other conferences, there are social activity.

The other element is the exhibitors. So the exhibitors are coming because they know that they have a product that meets the needs of the demographic that's attending the Congress. They're prepared to talk to you about their product. They're prepared to try to sell you their product. Be aware of why they're there. But this gives you an opportunity to look at products that may not meet your needs today. They may not meet your needs in the future. But it will certainly give you an indication of what's happening in the profession. What are the suppliers to the profession thinking it's going to happen to the profession in the future? Because most products are forward-facing. Have a look at the exhibitors. Talk to the exhibitors. If you've done some research beforehand, you'll know the sorts of products that they're going to have available for you.

Take this as an opportunity to have a look. It's bit like buying a car. When you walk into a car yard, you know that the sales person is not going to let you go easily. An exhibitor at the conference, you can go and spend two or three minutes with that exhibitor, and you can walk away. It's not as hard as trying to buy a car, for example. You can get some information very, very quickly without an obligation of spending a lot of time with that sales person. So the exhibitors are fantastic.

Jillian Bowen:

I have to tell you an interesting story is one of my team members here at CPA Australia, actually approached me when I was a speaker at a conference, and had a question after my session, connected with me, and then now, is one of our long-term CPA Australia employees. In terms of actually approaching a speaker, what's the process for someone who hasn't done it before?

Rob Thomason:

Yes. You'll see after, particularly the keynotes at a Congress or most conferences, not as large as on the concurrent sessions. The concurrent sessions tend to be a bit more informal and easier to make a connection with the speaker. The protocol, generally, with the speaker is that you go and approach the speaker. Most speakers will walk down, off the stage and be available at the front of the room to speak with people. Form a queue, people tend to form a queue. People, again in Australia, tend to be very polite.

I remember I was in a conference in India, where a particular speaker spoke and then all of sudden there was a crowd of probably 50 or 60 people around that speaker. That was impossible. But in Australia, we tend to be very polite, and we move forward. Have your name card ready, so the person remembers who you are. Be very, very brief about what you want to find out about that particular speaker, what the question is. They don't have time to enter into a conversation. They'll answer a question. They'll answer brief questions. Some speakers will say, "Get in touch with me, and I can provide more information." That's horses for courses on that one. They don't always do that.

A story, we know Matthew Luhn is coming to Australia for CPA Congress this year. I met Matthew Luhn at a conference in the United States last year, and it was through that introduction that we got him to come to Australia. You can actually do business with people very quickly, short, sharp delivery at the end of a conference session, and create the network, create the connection. These can lead to places.

Jillian Bowen:

Fantastic! There's some really great advice there, Rob. Thank you. I don't know about you, but I have to admit that I'm guilty of walking away from a conference incredibly excited by everything that I've heard, seen, talked about, and then I get back to the office, and I'm back in to my daily grind, and I've got these pile of notes to the side, and a few things will come up, and probably I will apply things, probably more subconsciously than consciously. I'd really like to talk about how people can actually be a little bit more proactive about taking those learnings, and turning them into actions.

Let's start with those new contacts - people like the speakers that you might have met, or people that you might have met in the queue to meet the speaker. How do you suggest people follow up with a new context?

Rob Thomason:

If you've entered your information into the app, in CPA Congress or another conference, you'll have contact details for all of those people already. You can start to nurture those contacts through that medium. If you don't, if you haven't found any contact details through the app, LinkedIn, keep in touch with people, because you never know when that individual is going to be useful to you, or you might be useful to them. LinkedIn is a great tool for doing that. It's a professional tool for people to work through and make connections with. If you're careful about your connections on LinkedIn, you don't get spammed. My suggestion to you is you only link in or you only make contacts with people that you have a connection with already on LinkedIn. Don't treat it like Facebook. Treat it like a professional networking tool.

You can keep those networks alive through LinkedIn and through emails. An opportunity might be that you actually get in touch with somebody and ask some questions, "What did you think about that session? I'm thinking you're doing x, y and z as a result of what I heard at that session. What do you think? If you don't get an answer, clearly that person doesn't want to keep or maintain the connection. But if you get an answer, this might be a start of a new professional relationship.

It's really hard. You've got to make time. It is hard. You have to make time to actually work on your network and maintain those contacts.

Jillian Bowen:

Absolutely, great suggestions. Before we get into that nitty-gritty of getting some really great smart outcomes, what about your manager and your other colleagues who may be interested? Do you think it's actually worth having a debrief with your manager after a conference?

Rob Thomason: Absolutely. So you've convinced your boss. You've gone to the Congress, CPA Congress or another conference. You've worked out your learning objectives. You've gone into each session with your learning objectives in mind. You've made some notes. You've come out with one or two great ideas. Now's the time to start to synthesise those ideas into what is executable. What are the things I can actually do in the workplace now with some of those ideas that I've got? Some of those thought prompts. Sometimes it'll be more than an idea. Sometimes you'll look at the whole process out of one of the sessions you attended, it's so much easier. You've got to start to consciously make notes and consciously develop an execution plan for what you're going to do with the learnings out of the conference.

My suggestion is that you offer to your boss to do a presentation around the conference what you might have learned, and to talk about what your ideas are for change or improvement of processes as a result of your learnings in the conference. You might suggest to your boss you do that with your colleagues, your peers, or the business unit that you work in. All that is important. But the most important element is that you have thought about your learnings, what your expectations were, what you've achieved, and how you're going to execute on those.

Jillian Bowen: As you pointed out, at the conference, your suggestion is that you aim to take one or two big things away from each session. But of course now, you're at the end, you may have attended 8, 10, or more sessions, how do you then take the one or two that's now grown to possibly up to 20 ideas, and start working that into an action plan?

Rob Thomason: When I go to conferences, and I do, regularly, it's part of our job to see what other people do, but also for my own learning and development, I'll have a notebook. Some people think pen and paper is old-fashioned, but I prefer the notebook. On the back page of my notebook, I just jot down and dot points of the big ideas. I might be in the front part of the notebook taking notes on what the speaker is saying; but the great ideas, the things that I know I can do something with, I just keep a dot point at the back of the notebook. Dot points.

Again, after the conferences, whether you're sitting in your office, or you're sitting on a train, or you're sitting on a plane, look through those great ideas and start to think about what I can do pretty well, straightaway. What I can do next time I get into the office? What can I make a change around that great idea? What can I do straightaway?

Your next priority is what's going to take a little bit longer but it's still within my power, still within my control. Then the third one is what are the big changes where I'm going to need funding or I'm going to need permission within the organisation to make change. So prioritise your great ideas.

Then the ones where you're going to have to convince people. You're going to have to put a little more thought into that great ideas about what you're hoping

to achieve out of that. You need to be thinking about how you're going to convince people around the change.

The big ideas where you're going to get funding, you have got to go back and develop a business case. But you've got the kernel of a great idea. You've got the seed there. You're just going to germinate it and keep that idea going.

Jillian Bowen: Great suggestions, Rob. That brings us to the end. It's been a fantastic episode today. And I think there's a lot of takeaways the people can get here that will really enhance their experience attending their next conference. I hope it is indeed, CPA Congress, and if it is, I hope you all look at an opportunity there to reach out to some of us and say hello, because we'd very much like to meet you.

Thank you for joining us again, Rob. It has been a pleasure.

Rob Thomason: Thank you.

Jillian Bowen: We have some articles and other information available with much more detail on this topic, and we'll add those to the show notes for you. If you'd like to download the transcript for this episode and access those resources, go to www.cpaaustralia.com.au/podcast. Make sure you never miss an episode of the CPA Australia Podcast by subscribing on iTunes or Stitcher.

Until next time, thanks for tuning in.

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