

Conference Success Playbook: Before, During & After

2026 Young Agents Conference

Purpose of This Playbook

This workbook is designed to help Young Agents and their supervisors maximize the value of attending the 2026 Young Agents Conference. By establishing goals before the event, engaging intentionally during the conference, and creating a post-conference action plan, attendees can bring meaningful ideas, relationships, and solutions back to their agencies.

Turning Learning Into Results

The value of a conference is not measured by attendance alone, but by the ideas implemented, relationships built, and improvements made afterward. Use this playbook to ensure your conference experience creates lasting benefits for both the attendee and the agency.

BEFORE

Review the agenda. Take time to understand the sessions, speakers, and opportunities available. Consider the following questions.

- Which sessions connect to my current responsibilities?
- Which topics address challenges our agency is facing?
- Which sessions could help me improve how I serve clients?
- In which areas do I want to grow, and which sessions address those topics?
- Who would it be valuable for me to meet?

What would help me become more effective in my role?

- | | |
|--|--|
| ☐ Growing my book of business | ☐ Strengthening client relationships |
| ☐ Improving sales conversations | ☐ Learning more about agency operations |
| ☐ Understanding industry trends | ☐ Building carrier relationships |
| ☐ Developing leadership skills | ☐ Expanding my professional network |
| ☐ Other: _____ | |

My goals for attending this conference:

- 1.
- 2.
- 3.

Agency Priorities:

What challenges or opportunities is our agency focused on?

- | | | | |
|--|--|--|-------------------------------------|
| ☐ Growth | ☐ Client retention | ☐ Efficiency and operations | ☐ Technology |
| ☐ Developing team members | ☐ New markets or products | ☐ Commercial growth | |
| ☐ Other: _____ | | | |

How does your conference attendance help address these priorities?

The Supervisor Conversation

Thinking through this ahead of time will help you feel more prepared to make the ask of your supervisor. Use this section as a guide to prepare for and have that conversation.

- **Meeting with Your Supervisor**

- Consider starting with something like this: “I’d like to attend the IIAV Young Agents Conference in October. I’ve reviewed the agenda and have identified several sessions that connect with my role and our agency’s goals. I believe that there are ideas and relationships I can bring back that will benefit our team, and I’d like to get your thoughts about it.”

- **Scheduling the Meeting**

- Share the conference agenda with them ahead of time, ask them to review it, and schedule a time to meet with them to discuss further.

- **During the Meeting**

- Review the first page with them, walking them through the agenda, your goals, and the ways you believe the conference will benefit you.

- **Questions to Ask:** (Choose as many as are relevant and/or that it would be helpful for you to have the answers to.)

- When I return, what would make you say that attending this conference was time well spent for our agency?
- Do the goals and thoughts I’ve outlined align with your goals for my attendance?
- What challenge would you most like me to explore while I’m there?
- Are there areas where you’d like me to brainstorm or learn from agents?
- What trends or changes in our industry should I pay attention to?
- Are there any vendors you would like me to speak with?
- What skills or knowledge would make me more effective in my current role?

- If I have approval to attend, I commit to the following:

- Attend educational sessions and participate fully.
- Connect with peers, carrier partners, and industry resources.
- Identify ideas that could benefit our agency.
- Share key takeaways with my team.
- Follow up with valuable contacts.
- Create a plan to put what I learn into action.
- Represent myself and our agency well.
- Meeting with you upon my return to review. (PRO TIP: Schedule this meeting now for within one week of your return.)

Engage Intentionally

Be fully present; the sessions will contain important information, and some of the most valuable ideas come from conversations in the hallway, at meals, and during networking opportunities. Stay curious, ask questions, and be willing to learn from as many people as you can.

Bring: ☐ Notebook ☐ Pen ☐ Business cards

Session 1: _____

Presenter 1: _____

What did I learn? What challenged my thinking?

Session 2: _____

Presenter 2: _____

What did I learn? What challenged my thinking?

Session 3: _____

Presenter 3: _____

What did I learn? What challenged my thinking?

Session 4: _____

Presenter 4: _____

What did I learn? What challenged my thinking?

What you do upon your return is the differentiator. Be committed to following through with the items on this page and putting what you've learned into action and you'll show that the investment made in you was a good one.

Debrief with Your Supervisor

Right after you return to the office (or even before you leave the conference) take a few moments to reflect on these questions in preparation for your follow-up meeting with your supervisor.

- My biggest takeaway was: What I learned about the challenge we discussed:
- What I learned from brainstorming and talking with other agents:
- Vendors I spoke with: Skills or ideas I learned specific to my role:

Other ideas I feel could benefit our agency: What should we prioritize?

Idea	First Step	Others Involved	Target Date

Would you like me to share what I learned with our team?

- ☐ Team meeting ☐ Lunch & Learn ☐ Written summary
☐ One-on-one conversations ☐ Department meeting ☐ Other