



The Treasury Conference Playbook

Practical tips to help you prepare, connect, and follow through.

For Treasury Professionals Everywhere

Your guide to making the most of any conference — from AFP to EuroFinance to Treasury Career Corner LIVE.



Conferences can be overwhelming - huge rooms, packed agendas, and a sea of faces. The trick? Preparation. The people who get the most out of AFP, EuroFinance, or even our Treasury Career Corner LIVE events aren't the ones sprinting around collecting every business card. They're the ones who walk in knowing why they're there and what they want to walk away with.

Before the Conference

☐ Define your purpose – Are you chasing CTP credits, new skills, job leads, or just building your network?

My purpose:

☐ Set goals – Be specific. At AFP Nashville, someone told me their only goal was “don’t drink too much at the Sunday reception.” Good goal, but let’s aim higher.

Goal 1: _____

Goal 2: _____

Goal 3: _____

☐ Build your plan – Block your must-attend sessions, receptions, and networking opportunities. Then leave white space for those “hallway conversations” — that’s where the magic happens.

Day ____–_____, __: __– __: __

Day ____–_____, __: __– __: __

Day ____–_____, __: __– __: __

Day ____–_____, __: __– __: __

☐ Prepare your pitch – A 30-second intro that’s memorable, not just your job title. Add a hook, a story, or a fact. Ask yourself three questions:

Who are you? What’s your job & where do you work?

What makes you different from the next delegate?

What do you want them to remember about you?

During the Conference

☐ Pace yourself – Free bar? Great. Just don’t pay with your soul the next morning.

☐ Be intentional – Networking is work. Two ears, one mouth: ask, listen, learn.

☐ Conversation starters – “What did you think of that session?” “Is this your first AFP?”

☐ Be authentic – People remember honesty and energy, not forced sales pitches.

☐ Energy recovery methods – Quick walk, splash of water, coffee reset. Build these in so you don’t burn out.

☐ Meet five people – A realistic, powerful target. Aim for quality connections, not a pile of business cards.

After the Conference

- ☐ Follow up fast – Within a week, drop a note: “Great to meet you, enjoyed our chat about X.”
- ☐ Add value – Share a relevant article, make an introduction, or recap a session you discussed.
- ☐ Reflect and apply – What’s one new idea you’ll take back to your team?
- ☐ What worked well for your networking approach?
- ☐ Keep compounding – One connection is good, five is better, ten can transform your career. Treat it like compound interest.
- ☐ Pay it forward – Be the person who shares advice with someone new at the next conference.

Who do you need to follow up with?

What sessions stood out for you?

What could you mention on LinkedIn that you found really useful?

Did you make the 5 connections you promised yourself? ☐Yes ☐ No

Final Thought 💡

The real magic of a conference doesn’t happen in the keynote slides.

It’s in the side chats, the hallway laughs, and the follow-ups that turn into lasting relationships.

If you put the *work* into net-**WORK**-ing, it’ll pay off — both for you and for your treasury career.

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