



FWI 2008 Annual Conference Resource Kit

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This kit was designed to help you seek financial support for your attendance at FWI's Annual Conference from your employers. [We also encourage you to use the ideas from this kit when seeking support for membership dues and local FWI events.]

This packet includes the following sections:

- Sample Letter Requesting Support
- Tips to Make Things Easier
- How to Overcome Objections
- A Sample Timeline

Please adjust the contents of the kit to suit your needs. If you have any questions about this resource packet or the annual conference, please e-mail info@fwi.org. Good luck!



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Sample Letter Requesting Support

Date

Boss's Name

Title

Address

Dear _____:

I am writing to request financial support for my attendance at Financial Women International's (FWI) 86th Annual Conference in Denver, Colorado from September 13-16, 2008.

FWI is a membership association of more than 800 financial services industry professionals. The association is dedicated to developing leaders, accelerating careers, and generating results for professionals in the banking and financial services industry. At their annual conference, FWI offers high-quality training programs, and the opportunity to network with other professionals in the financial services industry.

The cost of registration is \$699.00 (early bird rate), which is significantly lower than that of similar industry conferences, and it includes all sessions and several meal functions. This year's sessions and workshops cover topics such as *[insert names and descriptions of topics relevant to your field, your company's goals for the year, etc.]* and the skills and information that I will be able to bring back and use on the job will provide a tangible benefit to *[the company name]*. A copy of the conference brochure is attached for your review.

[If the company is likely to cover any or all travel and accommodations add]

Other expenses for travel and accommodations can be reduced by my sharing a room with another FWI member. *[Another option is to suggest splitting the cost with the company.]*

I appreciate your consideration in granting this request.

Sincerely,

Your Name



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Tips to Make Things Easier

- 1) Apply for a scholarship from your local group or your district. These are always an incentive for your boss to pay the additional costs.
- 2) Start early – design a plan that outlines your approach, and gives you a timeline.
- 3) Do your homework – this is a proposal. Be sure you are familiar with the content of the conference and how it will enhance you professionally.
- 4) Educate a variety of influencers in your organization about the benefits of FWI and its annual conference (i.e. boss, HR manager, training department).
- 5) Target information from the conference brochure or the “Conferences” page of www.fwi.org and focus on those general sessions and workshops that tie back to your company's mission and goals for the year. For example, if your company focuses building business, emphasize Ray Adler, *Fill Your Pipeline With A Never-Ending Supply of Quality Prospects*. If your organization focuses on productivity and effectiveness, share with your boss the information on Rochelle Balch, *Help! What's My Computer Doing? Troubleshoot Your PC for Free*. If your company focus is on goal setting and measurement introduce information on Bruce Christopher, *Leap! The Net Will Appear*. If some of your employee's passion and purpose toward work and career has started to fizzle, Lisa Bashor, *From Sinatra to the Simpsons: Engaging Multiple Generations in Your Workforce*.
- 6) If your department budgets, make sure you get your professional development costs included and use the FWI Conference speakers for just that. Keep in mind that conference expenses can be budgeted under a variety of categories (i.e. management/ professional development, HR, training, sales etc.).
- 7) Practice your pitch before discussing the conference with your boss. Make this a part of one of your group's regular FWI meetings. Sit down with a fellow FWI member, a friend, or your spouse and tell them why you want to attend FWI's annual conference. Practicing will make you more comfortable when you do the real thing.
- 8) Have your boss participate in the selection of workshops and sessions you attend and give a copy of the handouts to your boss from that session upon your return. Include volunteering for a seminar to introduce what you learned at the next staff meeting after you return. Highlight speakers, books, new techniques, practices, etc.



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- 9) Include details of your involvement in FWI in your annual performance review, this way your company knows it is an important aspect of your career.
- 10) First timers – get ideas from other FWI members and leaders who have accomplished this before. This is a great idea for a group meeting – what FWI and the conferences I've attended have done for me and my organization along with input on how to sell the conference to your organization!
- 11) Don't stop asking just because you've been turned down before. You've set the stage for your next request to attend conference.

How to Overcome Objections

This section shows possible objections and suggested responses to use when your employer is hesitant to support your attendance.

Employer: This conference will be too expensive.

- It is inexpensive when compared to the value of learning and networking opportunities.
- Many world-class speakers for one low price.
- Includes the cost of most meals.
- Express a willingness to cost share or negotiate.
- Present an actual comparative cost – for example, the Association for Financial Professionals (AFP) annual conference is \$999 for the early bird member rate; the non-member rate is \$1394.

Employer: What will the company gain from your attendance?

- Show how this will either save time, save money, or make money (i.e. learning more effective ways of increasing teamwork means less time spent reconciling conflicts, dealing with office politics, etc.).
- Ability to access programming that can be brought back to the organization.
- Connections with vendors, trainers, referral sources, new product/service ideas.
- Affirmative action credit.
- Practical skills development.



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Employer: Isn't FWI that "women's" organization?

- FWI does not discriminate – we have a few male members.
- FWI has been around for 85 years – we've survived because there is a need.
- Despite gains, women still need extra professional development opportunities and a supportive environment.
- FWI is a non-partisan organization, which focuses on issues affecting women working in financial services.

Employer: The company cannot afford to have you away from the office.

- The majority of the conference takes place over the weekend, so you'll only be out of the office 2-3 days.
- Have a plan showing who will cover for you.
- If necessary, consider using your vacation time, and negotiate.
- Absence is easier to manage now with e-mail and voicemail capabilities.

Employer: It will set a precedent (If I do this for you, I'll have to do it for everyone).

- This is an investment that will benefit the organization through me.
- There are lots of different ways to compensate employees – the conference is important to me, a benefit from the company I value.
- Supporting me at the conference shows the company's commitment to my professional development.
- Compare the conference to other (more expensive) opportunities you may not be requesting support for.



Leaders in banking.

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Sample Timeline

May	June	July	September	October
Design your plan, create your approach, establish your timeline.	Write and deliver a letter to your boss requesting support.	Send in your earliest bird registration before July 16 th and save \$100!	Conference begins on September 13 th !	Follow-up with your boss post-conference. Provide conference notes and/or handouts from the sessions you chose together.
Educate the "influencers" in your organization on the benefits of FWI and its annual conference.	Find a co-worker(s) who can cover your responsibilities while you're out of the office.	Finalize travel plans. Make airline and hotel reservations.	Last chance to make hotel reservations for the special FWI rate and availability. The cut-off date is Aug. 8 th .	Announce what you've learned at the next staff meeting – share tips and suggestions, make book/speaker recommendations, etc.
Target sessions from the conference brochure to your company's goals/mission.	Research areas of your dept. and company budget where the conference can be expensed.	Have your boss participate in the selection of workshops and seminars you attend.	Register for the upcoming September FWI TeleForum.	Include details of your involvement in FWI in your next performance review.
Research travel costs and other arrangements for budgeting purposes.	Follow up with your boss (see How to Overcome Objections).			Sign up for FWI's October TeleForum.

Good luck – see you in Denver!