In-Person Event Representation Checklist

A practical checklist for showing up at a conference, meetup, booth, or AMA (an ask-me-anything session) as a clear representative of a project. Use it before you travel, while you are on site, and after you leave the room.

01 Before you go

- ☐ In one sentence, write why you are there and what this event is for, for you.
- ☐ List the conversations you most want to have, with real names where you have them.
- ☐ Agree the role: host, moderator, booth presence, meetup lead, or someone who walks the floor for the project.
- ☐ Prepare a short spoken intro and a one-page handout you can actually stand behind.
- ☐ Confirm the schedule, badges, booth or room details, and who is in charge of each block of time.
- ☐ Pack cards, a way to take notes while standing, and a charger.
- ☐ Agree with your team on what you can say, what you cannot promise, and how new contacts get back to the team.

02 On site

- ☐ Arrive early enough to walk the floor and check the room or booth.
- ☐ Be present and easy to approach. Keep your phone down when you are on duty.
- ☐ Start with a useful question, not a pitch. Take a short note after each real conversation.
- ☐ Write down a name, a bit of context, and a next step — not a stack of cards with no memory attached.
- ☐ If you are hosting an AMA, meetup, or side event, start on time and close with a clear way to follow up.
- ☐ Check in with your team once a day so nothing important sits only in one person's pocket.
- ☐ Protect time to eat and reset. A tired presence helps no one.

> **You are in the room on behalf of a project.** Be someone people are glad they met, and leave with notes your team can actually use.

On-site notes and handoff

Use this page during the event and on the way home. The work is not finished when the hall closes. Hand a clean record to whoever owns follow-up. Use the Conference Follow-Up Sequence for the days that come next.

Conversation notes

NAME / PROJECT	WHERE YOU MET	WHAT YOU TALKED ABOUT	PROMISED NEXT STEP

Handoff to the team

Event / dates _____

Who owns follow-up _____

Most important conversations _____

Open promises _____

Materials to send _____

This checklist is a planning and note-taking tool. Agree travel, tickets, and on-site details with your team or client before you go.