

# CMT Association

## 2020 Annual Symposium

### Post-Conference Briefing & ROI Worksheet

<your name here>

#### Session Worksheet

*For your convenience, we have created this worksheet to help you take notes after sessions so you may record key takeaways, action items and estimated return on investment (ROI). You can use these notes to create your post-conference trip report.*

**Session Title:**

**Session Presenter(s):**

**Session Summary:**

Summarize the session

**Main Takeaways:**

Describe concepts, techniques or tips

**Action Items:**

Describe actions and immediate takeaways that you can apply to your investment management process

**Estimated Return on Investment:**

Where possible, estimate the value derived in your investment process by implementing the actions described above.

Repeat this section for all sessions you attend.

#### Professional Contacts

*Include contact information for all presenters, attendees and exhibitors who may be useful to your organization.*

**Name:**

**Contact Details:**

**Discussion Description:**

Repeat this section for session and keynote speakers you meet and wish to follow up with.