



NATIONAL ASSOCIATION OF STATE TREASURERS

NAST Treasury Management Training Symposium Toolkit

This toolkit was designed to help you seek support for your attendance at the NAST *Treasury Management Training Symposium* from your employer. This document includes:

- Sample email requesting support
- Tips to make asking for approval easier
- How to overcome objections

It is best to start your planning early, before your company's annual budget is finalized.

Please adapt the contents of this kit to suit your individual needs. If you have any questions about the *Treasury Management Training Symposium* or the suggestions in this toolkit, please contact [Emma Heydlauff](#). Good luck!

Sample Email Requesting Support

[Supervisor's Name]:

I am seeking approval to attend the NAST *Treasury Management Training Symposium* in Portland, OR from June 9-12th.

NAST is the leading voice for excellence in public finance. The conference integrates networking and education into every aspect of the 3.5 day agenda. The conference offers in-depth panels, discussion groups, and expert keynote speakers to help us achieve and sustain best practices in unclaimed property administration.

The cost of registration is \$675, which includes 8 meals. This conference will feature [personalized agenda highlights] and opportunities to build my network of contacts, which can help immensely when faced questions back at the office.

I appreciate your consideration of this request and look forward to your response.

Sincerely,

[Your Name]

Tips to Make Asking for Approval Easier

1. Start early. Develop a plan for requesting approval that includes adequate time for budgeting and evaluation by your supervisor.
2. Do your homework. Know the content of the conference and how it will help you, your department and your company.
3. Educate influencers (supervisor, HR manager, training department, etc.) about the value of NAST and the conference.
4. Tie the benefits of attending the conference back to your personal, departmental and company goals. Explain to your supervisor how attending this meeting will help make you more effective at your job.
5. Know your company's budgeting process and request money be allocated for you to attend the meeting.
6. Practice your pitch before discussing the conference with your supervisor. Explain to a colleague or spouse why you want to attend the conference. Practicing the conversation will make you more comfortable and confident for the actual discussion.
7. Offer to provide a report to your supervisor and/or department following the conference, sharing key takeaways.
8. Include details of your involvement with NAST in your annual performance review so your supervisor and company see that it's an important element of your career development.
9. Be persistent. If your request to attend a previous meeting was denied, try to address the reasons for the refusal in your next proposal. Just because you were turned down once doesn't mean you will be turned down again.

How to Overcome Objections

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

The conference is too expensive.

- The value of the information gathered at the conference is greater than the cost of attending. The information gathered will help ensure we are following optimal practices in unclaimed property administration, increasing our efficiency and making us aware of threats and challenges on the horizon.
- The conference provides the best source of educational and networking opportunities for unclaimed property professionals. Getting all of that in one event is worth the price.
- The cost of several meals is included.

What will the company gain from your attendance?

- Attendance will help me do my job better and help to increase the efficiency of our department.
- This conference will help me improve my knowledge and gain insight into how other people who do exactly what I do overcome on-the-job challenges.
- The quality and breadth of information I will gain at this conference is unavailable anywhere else.

We can't afford to have you away from the office.

- Explain who can cover your essential responsibilities while you're gone.
- Thanks to email and voicemail, I can stay connected and respond to time-sensitive requests during breaks and in the evenings, after meeting events conclude.

It will set a precedent requiring approval of other employees' event attendance requests.

- This is an investment that will benefit me, the department and the company.
- Allowing conference participation shows the company's commitment to not only my professional development, but also to ensuring I have access to the resources I need to do the best possible job.
- Compare the conference to other (more expensive) opportunities for which you are not seeking approval.