Independent Banker  
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Portfolio

[tag] Leadership at All Levels

[hed] How to work the room

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For this, the second in our series of tips for new (and seasoned) bankers, we’re looking at networking—an activity that most people find daunting, whether they admit it or not!

These days, we do a lot of our networking online via forums like LinkedIn, but they’re no match for meeting in person. Even so, we all know from experience that working a room can be challenging, especially a room in which we know nobody. The good news is, having a disciplined approach can work wonders.

**Start by planning ahead.** What kind of event are you attending? If it’s a charity event, school or local economic development group, think about contributing services in advance. Keep this generosity of spirit going throughout the event; lend a hand where appropriate. It’ll get you a foot in the door.

**Have a clear goal in mind.** Why are you going? Do you want to meet five new people, secure an invitation to another event or talk to a specific person? See if you can find out who is attending by asking the host for a guest list.

**Do your homework.** If you want to speak to a specific person, researching a little about them or their business will give you more confidence when you start a conversation. If you are attending a local community group meeting, look for previous meeting minutes and agendas to review before arriving.

**Prepare your introduction.** That includes your name, the name of your bank and your role there, but think about sharing something interesting about what you do. Remember to keep it short, though. Nobody enjoys monologues.

**Make sure you’re dressed appropriately.** Check social media for pictures of previous events to see what people wear, or talk to someone who’s been before.

**Arrive early.** It’s easier to walk into an empty room than a packed one.

**Scan the room.** Look for people you already know and people you want to meet. If you know the organizer, ask them to introduce you.

**Check body language.** Find a group that looks receptive to including another person. Alternatively, approach someone who is standing alone. They’ll appreciate the gesture, and it could be the start of a great business relationship.

**Listen carefully.** Focus on the person you’re with and make eye contact. Keep the conversation balanced: Reveal information about yourself, ask open-ended questions and focus on what they seem excited about.

**Keep moving.** It may be tempting to stay where you’re comfortable, but you’re there to make new connections. Just don’t look like you’re already planning your next move.

**Give and take business cards.** Whether you share a paper or digital business card, be mindful of the fact that handing out too many can come across as disingenuous. Make sure to follow up with your new contacts a few days later. Professional platforms like LinkedIn and email come in very handy, but don’t ignore the power of a handwritten note!

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