



STEP BY STEP PLAN

FOR ROUNDTABLE EVENTS

2025
EDITION

The Plan

1. Define the "Why" of the Event

- Reason to Engage: Why are you hosting this roundtable? Focus on creating value for your audience through:
 - Engaging with high-value prospects.
 - Content generation.
 - Educating yourself on industry trends.
 - Building a community.
 - Helping others with common challenges.

Tip: The event should address real pain points or challenges in the industry. Research the topic, ask your clients for feedback, and gauge interest through posts on social media.

2. Identify Who to Invite & Where to Find Them

- Attendees: Make sure your target audience is senior leaders/prospects.
- Your database
- Use LinkedIn:
 - 1st-degree connections for direct outreach.
 - 2nd-degree connections for broader engagement.
- Personalised Invitations: Keep invites personal and exclusive.
- Create Buzz: Generate excitement through social content. Keep numbers capped to maintain exclusivity.

3. Plan the Invitations

- Method of Invitation: Email and/or phone calls. Make sure the invitation feels personal and highlight the value at the start of the email, and include a link for more information (via canva) that we can track and follow up with later. Remember not everyone will register straight away. Some will need a follow up call.
- Reminder Strategy: Send reminders one week and one day before the event to ensure a good turnout.
- RSVP: Use calendar invites to confirm attendance. Try to keep it simple!
- Call everyone who signs up and ask them their biggest challenge in relation to the roundtable subject and make note of this so you can bring this up at the roundtable.

4. Event Agenda & Setup

- Set the Tone: reiterate the roundtable needs to be collaborative, open discussion. Avoid the formality of presentations.
- Agenda: Keep it structured but flexible – Have 5 key talking points based on what attendees told you is their challenge. Include time for open discussion and feedback.
- Venue Setup: Light snacks like pastries and water are enough.
- Interactive Elements: Use polls, stats, or pre-event questions to engage attendees. Capture moments for social media buzz (Pics, notes of discussion).

5. Facilitate the Roundtable Discussion

- Engagement Tips: As the facilitator, your job is to connect people and guide the conversation. Make sure all voices are heard.
- Open Space for Ideas: Encourage everyone to share their insights, challenges, and solutions.

6. Post-Event Follow-Up

- Maintain Momentum: After the event, send personalised follow-ups. Highlight key takeaways and encourage next steps.
- Keep Engagement Consistent: Reach out with a call after 2 weeks to keep the conversation going. Mention something they shared and thank them. Ask them what ideas they might have for the next Roundtable topic. Then ask them to catch up one on one.
- Social Media & Email Campaign: Post event highlights on social media. For those who didn't attend, send a summary email and offer a waitlist for the next roundtable.

7. Final Tip: You Don't Need to Be the Expert

- Your role is to connect people and facilitate meaningful conversations. Don't focus on being the expert—let the attendees share their expertise!

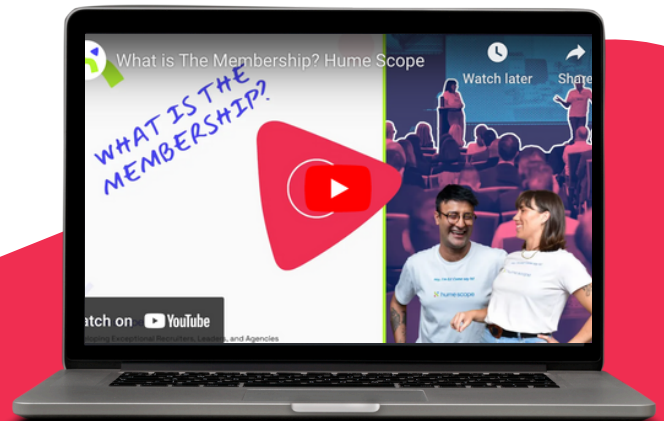
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