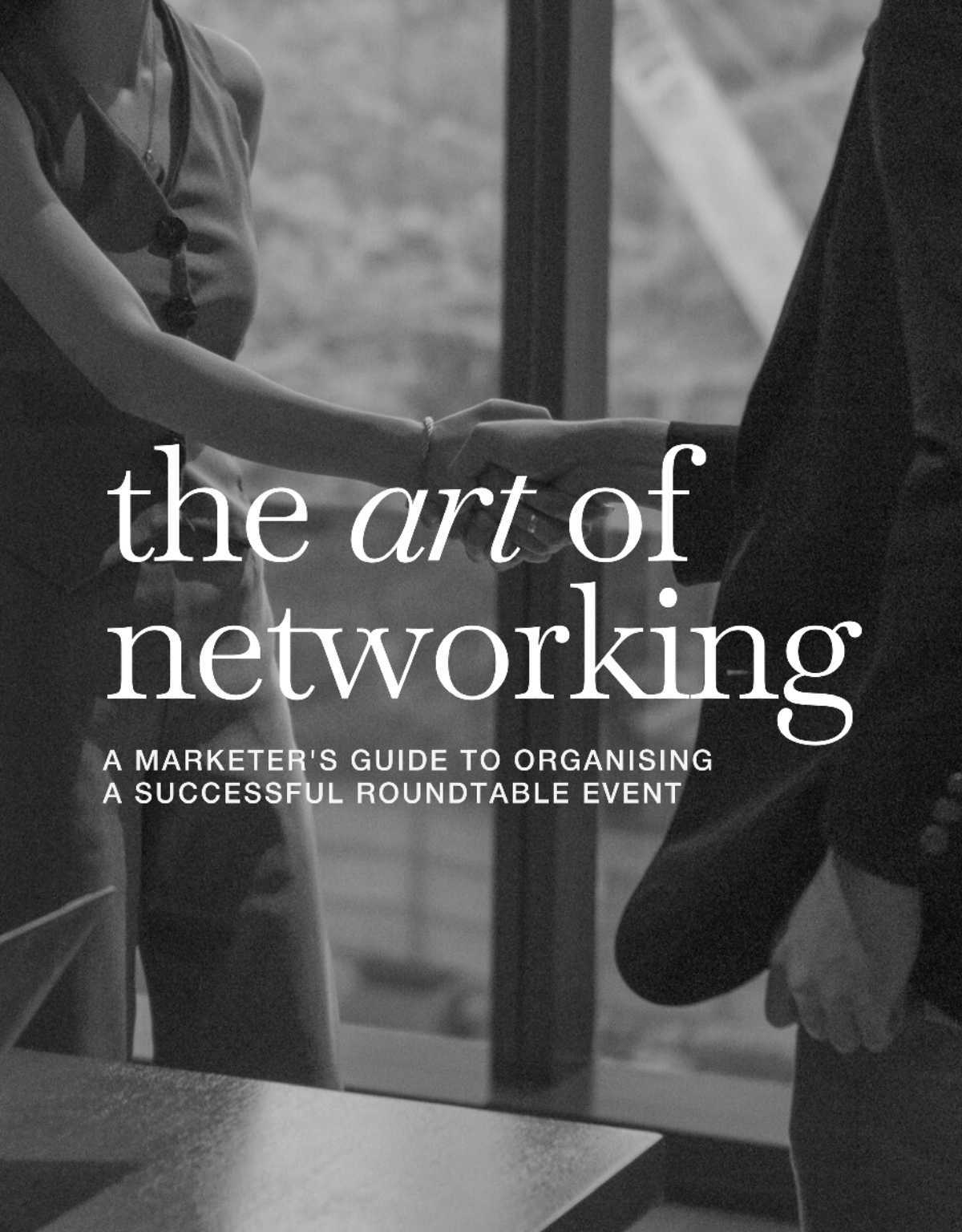




the *art* of networking

A MARKETER'S GUIDE TO ORGANISING
A SUCCESSFUL ROUNDTABLE EVENT

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A SUCCESSFUL ROUNDTABLE EVENT

Written by
THE ORTUS CLUB



Preface

Events have long been weapons of choice in a marketer's arsenal, especially in B2B.

Seminars, conferences, summits, panel discussions, product demos—the list goes on. That same list grew even further with the addition of virtual and hybrid event alternatives forced by the outbreak of the 2020 pandemic.

Today, avenues for networking and business development are simply endless, yet the impact provided by an intimate, small-scale roundtable setting is unparalleled.

In this guide, we will explore the opportunities that roundtable events offer and outline the essential elements for organising the perfect discussion. Our goal is to equip hosts with the ideal environment to build their networks meaningfully.

Taking the reins and leading the way is key. You have to have confidence in your teams and your abilities. You have to be confident in what you're doing, making sure that marketing has a voice in the organisation as well.





table of contents

Introduction	1
Why Roundtables?	4
Organising A Roundtable	14
The Goal	15
The Guests	16
The Topic	25
The Venue	31
The Table Setting	40
Curating Your Guest List	44
Ensuring Legitimacy	45
The Messaging	51
The Process	57
Remember Retention	61
The Guest List Done Right	64
The Event	69
The Programme	70
Add To The Experience	78
Following Through	83
What's Next?	84
Less Than Perfect	87
Maintain Momentum	89
About The Ortus Club	93
Contributors	95

Introduction

*Instead of just casting a wider net,
the key lies in finding the right
pool and casting a fine line.*

The sales landscape is constantly making strides in innovation, making opportunities for the wide-eyed and eager seem limitless. In an ideal world, all it would take would be to tell prospective customers you can solve their problem—an email, a quick meeting, an ad. However, the reality in B2B is that markets and consumers are more demanding than ever, competition is always on the rise, and getting a nibble in an endless sea of customers is easier said than done.

Any product or service, no matter how revolutionary or life-saving, will gather dust when put in front of the wrong people. There's no point in trying to sell to an audience that doesn't need what you've got. A deal closed through sheer persistence only creates friction, leading to an unhappy customer, a barren relationship, and a bitter taste in everyone's mouth.

So, how do you reach the right audience? Once you identify individuals who may be interested, how do you capture their attention? There are countless tried-and-true tools and strategies available to marketers. From traditional methods like email marketing to emerging practices such as account-based marketing, and innovative approaches for leveraging platforms like LinkedIn and WhatsApp, the options are infinite. Yet, despite this abundance of choices, marketers face mounting challenges. Increasingly restrictive laws and regulations, market saturation, and a growing audience aversion to marketing efforts are creating significant obstacles.

This is where roundtables come in.

From start to finish, these events are where marketers align all the elements to create an ideal environment for success in the B2B space. First and foremost, you have the opportunity to deliver real value to your invitees, whether through insightful knowledge shared during the discussion or by cultivating potential partnerships. Secondly, your guests have made a conscious choice to engage with you, opting for genuine dialogue over cold calls or unwanted pitches. Most importantly, these gatherings transcend mere transactions, allowing you to forge authentic connections that can blossom into enduring partnerships.

And while technology quickly develops, introducing exciting new ways of communicating and sometimes pointing to a disproportionately digital future, it can never outweigh humans' intrinsic need for genuine connection.



| why roundtables?

THE ART OF NETWORKING

They're focused exclusively on your ideal audience.

Who's your ideal audience? What job titles do decision-makers in your pipeline hold? Which companies would benefit from your offering? These are just some of the questions you should ask yourself when narrowing down your audience.

Each new relationship can become a game-changer towards your success. However, an overstuffed Rolodex without the right people is just a paperweight. A community of practice and a circle of valuable collaborators will always be more beneficial than an extensive but superficial network. Engaging directly with your ideal audience enables you to invest the necessary time and effort to establish a strong network that will bring your B2B game to the next level.

Your audience should consist of leaders seeking a community of peers with whom they can openly share key insights into pressing business challenges.

Roundtables provide excellent opportunities for community building by enabling decision-makers to share ideas and insights openly. In these discussions, executives participate not as representatives of their organisations but as individuals, offering unique perspectives. This inclusive approach allows even peers from competing firms to engage collaboratively. Designed to create a safe and respectful environment, roundtables encourage the free exchange of diverse opinions and ideas.



There's value for the audience in attending.

It can be lonely at the top, and roundtable discussions can alleviate the worries that plague business leaders. Through knowledge-sharing, executives can connect with like-minded peers facing similar challenges and opportunities. This results in external collaboration becoming more ingrained in the strategies of forward-thinking leaders, and the opportunity lies in the fact that your audience will want to attend your roundtable.

With no lingering pressure to provide immediate answers nor yes-men echoing every thought—plus a mutual promise of confidentiality—senior decision-makers can engage in a healthy exchange of ideas with fellow participants, speakers, and experts. Whether over a meal or behind laptop screens, these candid conversations get to the heart of what keeps execs up at night.

There are two main types of knowledge: explicit and tacit. The former consists of hard skills, procedures, and other information from literature, tutorials, and training. The latter is our focus. This is gained from experience in applying explicit knowledge. Deeply rooted in context, tacit knowledge is where the real value is. Whether they're aware of it or not, everyone possesses a wealth of knowledge, as no two individuals or organisations will share the exact same learning path.



You can do great things yourself and deliver incredible work for your organisation, but if you can inspire other people to do incredible work, whether that be through passing on knowledge or encouraging them, you can create an impact much larger than you could yourself.



During a knowledge-sharing event, guests find more value when they can have a diverse but focused exchange of ideas on a particular topic or challenge with which they are familiar.

This enables participants to consolidate separate pieces of information into a wider, more comprehensive perspective on any given subject, rich with context and derived from unique experiences.

In doing so, guests create the value of shared knowledge. It is the force that drives further growth and enables more extensive and productive collaboration, ideation, and problem-solving.

Eleanor Roosevelt once said, *'Learn from the mistakes of others. You can't live long enough to make them all yourself.'* This is a lesson by which successful individuals live. The culture of knowledge sharing fosters this mindset, and for knowledge sharing to occur, an environment conducive to a candid conversation must first be put in place.

The discussion is focused on challenges that you know how to solve.

Failure is an art, and those at the top have mastered it. This is where the value of discourse lies. In a safe environment where confidentiality is assured, discussions among high-level peers will often touch on pitfalls and challenges. Everybody thinks they know what to do (or they posture as though they do), so C-level executives often look for what not to do.

However, context is still key. Why delve into the intricacies of network-building when the internet is filled with case studies and professionally published articles? What's the value in hearing it directly from the source? The answer lies in the fact that credibility extends beyond just a product, platform, or brand. So many promise the world, but only a few can deliver. Google is a treasure trove of limitless information, but there is always more to gain from listening to actual people. This is especially true for B2B interactions. Amazon reviews might be good enough for small purchases, but there is a reason why B2B transactions are built on human-to-human connections.

This is where true insight lies for them. But for you, as the host, the value lies in what you already know. When arranging these roundtables, you should already know how the discussions will go. The value isn't in getting them to say something new or revolutionary. It's in getting them to share the problem you've already solved for others. Remember that this starts with you. These events only succeed when you are prepared, when you have the knowledge, and when you are capable of answering the difficult questions.





Step back, observe, and prioritise. The environment is dynamic, and it's taught us to always be ready for change. One of the things we ought to do is listen and deepen relationships across the board.

| organising a roundtable

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The goal

The desired outcome and purpose of your roundtable must be set and clear from the very beginning. Are you looking for new clients? Do you want to re-engage existing partners? Are you conducting market research? Do you want to build your brand? Are you seeking investment? Understanding the objective of a roundtable event is essential, as it streamlines the entire process, from selecting the venue to sending out invitations. Each element must align seamlessly to create a cohesive and successful event.

The guests

The rationale

Different people will attend a roundtable for various reasons and judge the hosts and the event based on whether their expectations are met. Some are there to promote their services, while others aim to explore their next career steps. Some hope to learn and gather ideas, while others seek entertainment. Organisers must cater to all these needs. It's not just about your objectives and desired outcomes; you must also consider your guests' goals. Their rationale for attending may affect the general outcome of the occasion.

Senior executives tend to be especially busy. Their time is valuable and in demand, so it will take much more than just a fancy restaurant to have them commit to spending an hour and a half with you. A myriad of factors must align to answer a VIP's 'whys': Why are you worth their time? Why that specific time of day? Why should they even respond to your invitation?

Determining the guest list

You'll want to have your attendees in mind as early in the planning process as possible. They are your target audience, after all. They are the ones around whom you will be structuring your topic and logistics. You'll want to nail this down early and base it on the details of the desired conversation you want to have. Take a good look at your rationale. Who are the major players in the field?

Who can benefit from the exchange of information? Who are the disruptors that can provide a fresh perspective? Assemble a diverse party of professionals, and you're in for a lively discussion.

You're not the only one who will be networking at your event; consider what your guests will gain from attending. If you aim to enhance your reputation or expand your contact list, your guests will likely have similar expectations. However, it's crucial to curate the guest list thoughtfully. Simply gathering big names from large companies may seem impressive, but it won't lead to meaningful interactions. We'll get to the nitty-gritty of perfecting your guest list in the next chapters.

A delicate balance between commonality and contrast must be maintained to ensure the optimal dynamic. Have guests competing over market share, and they may find themselves hesitant to share sensitive information. Too far apart in field or function, and your guests will have nothing to learn from each other.

This balance hinges on a single point of commonality among potential attendees. For your guests, their primary purpose in attending your roundtable is to connect with like-minded peers to discuss pressing business concerns and trends. To drive that purpose, you must find that one concern or trend that your attendees seek to address urgently and use it as the common ground from which their conversation will spring.

A clear common interest can always be identified, but you may need to take the lead in finding it. Do a bit of digging and develop a topic brief from which an issue or trend of interest can be curated. Ensure that this common trend or challenge is well-researched and highly relevant to your guests and the roundtable discussion.

Most importantly, guests must be familiar with the subject at hand. The topic is the basic foundation of the event, and familiarity with the topic is the bare minimum. Guests are looking to share insights over meaningful conversations, not give a crash course on the intricacies of the field over wine and cheese.



Pro tip: Consider the wild cards. It's important to have a target audience in mind, but don't limit yourself. Professionals from adjacent fields or industries could very well add a new layer of insight and knowledge to your discussion. This added diversity can greatly enhance your event and may even uncover new areas for you to target in the future.



Your established connections

Through knowledge-sharing events, not only can you initiate relationships with new faces, but this is also a chance to reconnect with long-time clients and partners. Furthermore, your connections can also spread the word about your business as advocates of your brand. People will always trust praises from a third party over your own marketing. Nothing beats genuine word-of-mouth testimonials as an effective sales tool.

Pro tip: Hire a photographer. First, ensure there's enough space for them to work, as function halls and private dining areas can often be surprisingly small. However, if your budget allows, investing in professional photography can significantly enhance your guests' appreciation of the event through high-quality images.





*The more you stretch
yourself to see what's
happening in other spaces,
the better opportunities
you can find to bring back
to your business*

The best representative

You'll want to make sure that whoever is representing you at the table can not only keep up with the conversation but contribute in a meaningful, neutral way. It's easy to fall into the trap of having the most charismatic salesperson attend, but remember that this is a knowledge-sharing event first and foremost, and your guests are attending for that reason. Match the seniority of your guest list; If it's a roundtable for CTOs, send your CTO.

The moderator

Every great discussion needs a capable moderator to steer the ship. Given the nature of these conversations, it is easy to spend hours on a single sub-topic. The moderator is there to prevent stalling on any one point and guarantee that the conversation flows naturally and without interruption. A moderator must also be well-versed in the topic at hand. They should be another source of insights, and they must be able to know when to dive deeper into or steer clear of certain matters from participants. Additionally, stronger personalities and opinions often dominate conversations, making it the moderator's responsibility to encourage quieter participants to engage and contribute to the group.



It was fascinating to learn that, despite the different industries and customer segments that we serve, our challenges were similar! It was also great to meet other leaders in person, share, and learn. Excellent facilitation. Thank you to all the attendees for making this an insight-rich conversation. Looking forward to more of these in the future!

The topic

Transcend small talk

Top decision-makers, with whom you will rub elbows with, are likely already up to date on the most relevant news and trends on their radar. So, come event day, what will they discuss over their canapés and wine? The moment your invitee reads the discussion topic will likely be a make-or-break factor in whether you'll be seeing them or not. At the end of the day, looking past the 5-star meals and expensive drinks, insights from peers are what leaders are after.

The topic is an overview of what to expect during the discussion. It introduces the challenges and opportunities surrounding a particular subject (an industry, trend, tool, etc.) and serves as the starting point for the group discussion during the event.

This is one element of your event that you have complete control over. Venue staff can make mistakes, food may not meet expectations, and confirmed RSVPs can abruptly back out. But the topic and the structure of the discussion are entirely in the hands of the host. A well-crafted topic will elevate an otherwise average event, but a poorly created one may spoil even the most perfectly organised occasion.

Pro tip: There's nothing worse than an overused topic. It's easy to hop on the hottest trend, but it's likely your audience has heard enough about it. Approach trending topics from an angle that is niche yet still relevant.



Talk context, not products

You're aiming for natural conversation, not a sales pitch. The topics should spotlight issues relevant to leaders, emphasising why these subjects are worth discussing. Veering towards anything resembling a sales spiel will prevent potential guests from attending your event. 'What is this about?', 'Why should I care?', 'What can I learn?' These three questions need to be the foundation of your event's topic.

Approach with focus

A topic must have a focus. A shotgun approach is inappropriate when preparing discussion points, as conversations can very easily wander into undesired areas. Yes, casting a wide net will increase your chance of getting a catch, but remember that the fit is your focus, not the quantity. Gathering a large group with nothing in common, all wanting to talk about different things, will only score you a night of confused looks and glances at the clock. Your guests share similar needs and challenges, and you need to leverage these shared interests.

Keep it high-level

On the other hand, the topic must not be too technical. Creating a narrow scope will alienate a large portion of the target audience. You don't want to restrict your agenda. It's like navigating a river: you want to steer your boat through the currents, ensuring a steady course without getting stuck in shallow waters or drifting too far off course.

With the right balance, you will have an open conversation ready to go where the wind takes it—within reason, of course. Having IT cloud professionals as the target audience does not mean every single invitee will want to talk about the ins and outs of every software system out there.

Specialise in content, not subject matter

It would be very difficult to become an expert on every single subject your guests will want to talk about. They're high-level executives for a reason. If it were easy to specialise in what they do, then everyone would do it. Plus, you don't want to run the risk of misusing overly technical jargon. It's embarrassing.

The topic should aim to ignite a conversation rather than control it. Guests will naturally flow with the discussion, and if the topic is too technical or specific, it may restrict their engagement. Invitees don't require detailed information on your registration landing page; you only need to spark their interest. Essentially, you're just guiding them to the opportunity without overwhelming them.

Add structure

Including three subtopic questions keeps the conversation flowing and avoids stagnation. Any fewer will leave your guests wanting more—not in a good way. Overshoot, and you'll have rumbling stomachs, heavy eyes, and short answers.

When you have people in the room having a conversation around a pain point, they're telling you what they need to solve the problem, and they're telling you what's relevant for them right at the moment. So for us to be able to hear that, we can take that information and apply it to how we're going to talk to our audience.







The venue

When choosing a location for your event, it's tempting to be drawn to 5-star restaurants and prestigious venues. After all, who wouldn't want to host an event in the most luxurious dining rooms? However, it's important to remember that the ideal venue is the one that doesn't cause unnecessary stress. While great restaurants are abundant, planning an intimate dinner for 8-12 VIPs is a completely different challenge than a typical night out. Aim high, but prioritise ease and efficiency.

Beyond name recognition

Don't be mistaken: an unforgettable dining experience is still a major part of the goal. Those at the top are used to dining on the finest cuisine. A high-end, well-known hotel franchise is always an option, but you must aim for the unforgettable. A 5-star boutique hotel may be lesser-known, but it is likely to give you a bespoke experience that bigger names may be hard-pressed to replicate. Furthermore, you have to think well beyond the amuse-bouche if you want your event to be a success. Can the venue quickly adapt to a fluctuating number of guests? Can they adjust meals to a constantly growing number of guest-specific dietary restrictions? Are they flexible with their seating layouts? Will they be able to provide audio-visual equipment should the need arise? These are just some of the often-overlooked aspects that can make organising an event a logistical nightmare. Above all, do you think you can form a long-lasting partnership with them? Those preferred customer discounts and waived fees are not to be understated.

Pro tip: Pass on the literal roundtable. It sounds counterintuitive, but a single large roundtable may work better for an intimate event with 8-10 people, whereas multiple smaller roundtables can lead to isolated discussions. These setups only allow guests to effectively interact with their immediate neighbours, thereby making isolation all the more likely. A long table, on the other hand, minimises the space between guests, allowing them to engage in conversation from any practical direction.

Determine your local requirements

Is your venue far from the business district? How do people in the area prefer to commute? Consider the needs of your audience depending on where you're planning to host the event. Your guests might require a map with specific directions. You might need to provide parking. You might want to advise them to head to the venue early due to traffic. Make sure you do as much research as you can on the area, as there are countless factors that could derail your event, such as the inevitable traffic jams, construction, scheduled road closures, and more. Just consulting Google Maps for an ETA isn't going to cut it. You could even take this opportunity to remind your invitees of your event. 'Are you going to need parking for the roundtable dinner next week?' Simple but extremely effective.

Pro tip: Provide actual coordinates. It is surprisingly common for people to get lost because two venues have the same name. Don't leave room for confusion.

Preserve utmost privacy

Make sure you have a private dining area. Don't settle for a curtain dividing you and the main dining hall. You'll want to make sure the only people your guests can hear are each other. This is a roundtable discussion, first and foremost, and yelling over a sea of voices or the sound of a loud kitchen will get you nowhere. But, if it's a big venue that you have all to yourselves, consider AV equipment. Having soft voices getting lost in the void, muddled by echoes, or overwhelmed by the silence of an empty room can be just as bad. A few microphones and well-placed speakers should do the trick.





It was interesting to hear the views from different industries as to what worked for them. Sometimes, the best ideas come from outside your industry! In my experience the greater the distance between the problem and similar fields, the greater the originality of the solution. You are not limited to “known” solutions to the problem.



Create a seating plan

Ideally, you'll have a diverse guest list of professionals fulfilling different functions, growing at different paces, or serving different niches. With that said, certain guests will have a better time seated next to some rather than others. Carefully consider who is positioned around each guest. While planning your list of potential attendees, note their respective job titles, industries, and organisation size. Find commonality and variety in these areas and determine your seating arrangement based on these criteria.

Pro tip: Consider seat-swapping. Conversation can get stale, and you may realise later on that guests seated away from each other would actually have great chemistry. Take a chance, and shuffle the seating arrangement, perhaps for dessert or coffee. This way, you can open up so many more paths that the conversations can take.

Leave no seat empty

While a seating plan is handy for engineering how the night will go, things don't always go according to plan. If there is a holding area where your guests can wait comfortably, don't seat them until right before you're scheduled to begin. Empty seats will only alienate guests on either side or, even worse, communicate that some RSVPs didn't think it was worth their time.

Seat latecomers at the end of the table, closer to the entrance, and fill the seats gradually as guests arrive, rather than adhering strictly to your original seating plan. You will almost always have tardy guests or last-minute cancellations, and late arrivals can easily disrupt the flow of the conversation, dramatically altering group dynamics. This way, these guests can discreetly join the discussion. Furthermore, you have to know when it's time to admit that a guest isn't coming and have their seat and the dinnerware at the table removed. It's a matter of optics, but you never know what negative effects these small details could have on your guests' subconscious. Don't worry; if you decide to take the advice on seat-swapping, then you can adapt and optimise the arrangement later on.

Family style or plated service?

A three-course meal might be the standard for these types of events, but there is a myriad of reasons one could go in either direction. To start, family-style meals are often overlooked and seen as more of a casual approach to dining. However, this isn't necessarily a negative. These communal meals are deeply ingrained in numerous cultures around the world and for good reason. The sense of togetherness and genuine interaction that comes with these dining experiences is definitely an underappreciated benefit. Plus, this style affords more flexibility and thus, the potential for enhanced cost efficiency. However, so many more factors come to mind when serving this way.

A spill or two is almost inevitable. Some dishes will be unreachable. Guests will be whispering or worse, talking over each other, about passing dishes here and

there rather than about the topic at hand. A three-course meal, on the other hand, provides a straightforward experience. Everyone starts and ends each course at the same time, dietary restrictions are easier to accommodate, and guests can focus on the conversation. While plated service might be the safer bet, don't feel restricted. All you need to do is to approach this choice with the right expectations, preparedness, and intentionality.

Determine dietary restrictions

Make sure you know your guests' dietary restrictions. You want your menu to be as accessible as possible, but not everyone has the same needs. Your guests may have dietary needs stemming from beliefs, religion, conditions, etc. Let your venue know as far in advance as possible, and on the day of the event, double-check if they were able to adjust. Again, you can take this as an opportunity to nudge your guests, so wait as long as your venue will let you before arranging special menus.

Pro tip: Keep a record of any special dietary needs your guests might have! After all, you're looking to form a long-lasting relationship, not just a one-off. The next time they give you that coveted 'See you there!', you'll be ready.

The table setting

The expected

Let's cover the basics: your table needs decorations and a menu. While dinnerware is essential, these elements are what guests will notice most if they're missing. However, just because they seem obvious doesn't mean they're simple. What kind of decor will you choose? An elaborate centerpiece or a long row of flowers may work for a wedding, but such distractions can interfere with the main goal of your event: encouraging conversation. Opt for something small and elegant instead. We'll discuss additional items to include on the table later, so make sure to leave some space for them.

Name tents or badges

Having a name tent with a guest's name and company in front of them does wonders for getting the awkward introductions out of the way. It's an instant icebreaker. Furthermore, this will help you or your moderator call on people and keep the discussion flowing easily throughout the group. Plus, it just makes everyone feel special, appreciated and welcomed. For events or experiences where people are expected to do more roaming around or even table-hopping, a name badge is the way to go.

The program

This makes the whole experience feel substantially more cohesive. Having an agenda readily available for each of your guests shows that you value their time. Instead of having them guess when the meal will commence, when the discussion will end, or when they should be booking their cab, have it all laid out for them.

The menu

This might not even need to be mentioned with a lot of, if not most, restaurants, but it doesn't hurt to make sure it's there. This way, your guests won't be surprised by what's placed in front of them later on, and they won't be deep in thought trying to determine what they're munching on rather than listening intently to the discussion. Most importantly, if they didn't have the opportunity to share their dietary restrictions beforehand, this gives them one last chance to do so, provided that your chosen venue is flexible enough to accommodate their needs.

The gifts

Consider giving a small token of appreciation. If it's nice and small, keep it on the table as it might even make it to your guests' social media accounts. However, if the gift is larger—like a gift basket—that they can't easily set aside during the meal, it's best to wait until your guests are leaving to give it to them. No matter which option you choose, ensure that the gift is worth keeping. It should reflect thoughtfulness, whether through a personalised item or something relevant to the event's topic. Either offer a meaningful gift or skip it altogether; your guests likely already have enough branded pens and logo-covered laptop sleeves.



Feedback avenues

Feedback is crucial today, whether for creating an effective dialogue with your audience or enhancing your online presence. The importance of well-written, constructive feedback cannot be overstated. Including a QR code, either as a tent card or on the back of your program, can be very effective. Transitioning feedback from face-to-face interactions to an online format allows guests to share their thoughts without pressure and gives them the opportunity to reflect on the overall experience. You might even consider adding a call to action for them to connect with you after the event. Either way, ensure that you actively seek their feedback afterward.



| curating your guest list

THE ART OF NETWORKING

It's easier said than done

Inviting guests is laborious, time-consuming and, at times, disheartening. If it were easy, everyone would do it, and your role would be less valuable. The process is complex and unpredictable, as numerous factors must align for a successful invitation. A 'no' isn't necessarily a reflection of your efforts or abilities. Results aren't always replicable, so adaptability and resourcefulness are essential to your success.

It's an intricate and complex process that is often underestimated by those on the outside looking in. Gone are the days when cold-calling a narrow and targeted list of invitees led to satisfactory acceptance rates. Today, filling a 10-seat table often requires reaching out to countless contacts. This painstaking task demands a wide array of tools and skills, but ultimately, it's the guests who make the event worthwhile.

Ensuring legitimacy

Top-level decision-makers are highly discerning when it comes to accepting invitations to events. They will often look for signs of legitimacy and value, ensuring that the roundtable, talk, or conference presents a worthwhile opportunity. Be prepared to answer any questions your prospective attendees may have, and respond to these inquiries promptly and confidently. To avoid receiving an outright rejection or no response at all, you need to take the necessary steps to make sure they don't get the wrong idea.



Be verifiable online

Perhaps most importantly, establish a strong online presence. Regardless of the assurances you provide your invitees, if they're skeptical, they won't be convinced. Create an online space where they can independently verify your legitimacy. Invest in a memorable website and secure an official company domain. Collect reviews for your business to showcase your credibility and demonstrate your commitment to being visible.

Leverage social media

Beyond your own website, it's essential to be where your audience is. Today, LinkedIn is the go-to platform for executives. It's invaluable for brand-building, generating interest, follow-ups, and managing relationships. Regularly update your profile, post frequently, and continue expanding your network. Being active is crucial—whether it's sharing photos, insights, or engaging with others' posts. Focus on building a genuine and active online community; you don't need millions of followers, but a legitimate following will elevate your brand from unknown to indispensable.

Speakers and key participants

While all guests are treated equally, some will inherently bring more value to your event. These are your VIPs—individuals like prominent figures, industry influencers, executives from major companies, or highly regarded speakers and experts. Prioritising these guests is crucial for various reasons, so do everything you can to secure their attendance.

Once you have them on board, inform the rest of your audience about who will be at the table. This demonstrates that if you can create value for these seasoned, established names, you can do the same for anyone you reach out to. Leverage the trust these VIPs have in you to build credibility with potential attendees. Additionally, knowing who they could be networking with may encourage others to join for the opportunity. There's no better way of telling your audience that they belong at the table than telling them who else is going.

Pro tip: This list of VIPs includes your moderator. The fact that you have a professional taking the time to use their expertise to lead the discussion shows your commitment to the event's success.





I enjoyed a great dialogue. Besides great use cases with leaders' experience across sectors, I was so glad to see candid call-outs of silos and disconnects within enterprises and brands to stack up the growth story being customer-centric. I love that.

The messaging

Focus on the target

While it often does take sending dozens, if not hundreds, of invitations to guarantee an attendance of 10, you should avoid relying heavily on a broad spray-and-pray approach. Ensure that the exclusivity of your event is targeted toward your actual target audience who possess both the knowledge and interest to tackle your selected topic.

Research, research, research

Research the target audience. Find out who matters and what they would bring to the table. Research the invitees, know their backgrounds, and let it show in your invitation. Lastly, research their needs. Are they posting about certain topics on LinkedIn? What would someone in their position want to hear about? In other words, what can you bring to the table? What can they bring to the table? People want to feel valued and want to talk to people who can bring value to them in return.

Make sure to personalise

Generic messages and invitations have long been the torment of executives, especially with the dawn of generative AI making canned messaging both easier and tempting to overuse. Take that extra step to personalise. The added work

is worth it. Make it clear that there's a human being inviting them, not just a company bot. Not only will this make them feel more welcome and wanted, but you'll want these connections in the future.

Cut to the chase

Get the message across clearly and concisely. There's a fine line between a personalised invitation and meandering conversation, and your invitees may not give you the time of day if your opening salvo falls into the latter. Your first message is crucial in encouraging your prospective attendees to join you at your event.

Find the right balance

It's always a balancing act. On the one hand, you want to strike that feeling of familiarity when you personalise. On the other hand, you don't want to come off as a stalker or end up wasting time doing full background checks on each and every one of your invitees. In terms of getting your message across, you want your invitee to know as much about your event as they need to get them to say yes. However, you don't want to overwhelm them with details they wouldn't want to bother reading on a busy day.

Consider these two examples of a subpar opening message.

'Dear Mr. Hoxton, my organisation is hosting a roundtable dinner for senior leaders in marketing, which will tackle customer journey in a digital-first world. As someone with 15 years of experience in finance who is now the CX head for a financial institution, we would appreciate your attendance at this

discussion. The dinner will be happening on Tuesday, June 11th, at the Sarocha Room at Siam Kempinski Hotel in Bangkok. Parking is provided at the premises. If you're booking a car service, vouchers will be provided to and from the venue. Can I count you in?'

Or, on the other end of the spectrum:

'Hey Mark, how's your week going? Are you free next month? Because I'd love to have you at an upcoming roundtable.'

Instead, get to know who you're inviting but get straight to the point. Show an interest in their work and spell out the reason why you think you'd provide value to them. Perhaps something like the following:

'Hi Sandeep, I saw that you've been posting a lot about event marketing. I loved the additional insight you gave about the report you shared last week! I'm actually hosting a roundtable for marketers specifically on the topic of events next month, and we'd love to have you at the table. Is that something you'd be interested in?'

This already answers the critical questions, 'What is this event about?' and, 'Why do you want me at your event?' all the while showing that you know who they are and (hopefully) that there's an actual human talking to them. You can then continue the conversation with the other pertinent details about your roundtable, such as the date, time, and venue once they've expressed interest.

Localise your approach

If you are planning to scale your event organising to the international stage, keep

in mind that cultural differences can have you rethinking your entire strategy. For example, those in the US appreciate straightforward messages and simple, yes-or-no questions; LinkedIn correspondence is much more effective than emails in Africa; and Japanese events usually see higher-than-average attendance rates from confirmed RSVPs. Learn as much as you can about your location's culture, and adapt your strategy accordingly.

Pro tip: Keep it colloquial and use their first names. A casual but polite greeting brings familiarity, making it more likely that you will get their attention compared to 'Dear Sir/Madam'. However, it may not be the same everywhere. Some cultures may place more value in surnames, for example. Push the limits of informality while staying culturally respectful.

Stay in the loop

Observing and forecasting trends in various industries is also important when planning roundtables, especially if you intend to curate executive dialogues across a wide spectrum of businesses. Doing so may enable you to lock on to growth opportunities and pain points more accurately, which, in turn, can provide you with a clearer framework for your roundtable topics. For instance, organisations in the finance and banking sector have been exploring more effective approaches to merge cutting-edge analytics with traditional, human-focused operations. Cybersecurity providers today are also looking at tapping the event marketing space to generate more actionable leads and drive higher ROI and revenues. In addition, ecommerce and hospitality leaders are developing comprehensive strategies for delivering more creative, engaging, and fruitful customer experiences on digital platforms, focusing primarily on cloud solutions.





The process

The platform

The end-to-end process of guest acquisition demands the use of multiple digital tools. However, today, nothing holds quite as much power as LinkedIn. At least for now and with the exception of a few countries, LinkedIn stands at the top, and if it is replaced by a newer, shinier platform, the same basic principles should apply. Whatever may come, it is vital to stay up to date with all the new tools and platforms that come on the horizon.

Let technology do the heavy lifting

Apollo, YAMM, Sendy, LinkedIn Helper, and MailWizz are just a few of the tools you can leverage. These tools and their equivalents can curate and reach thousands of prime candidates in a matter of hours. You can continuously add and subtract from this list as you see fit, but the point is that you can let the technology do what would otherwise take countless hours of manual labour.

Be disciplined with technology

These tools are only meant to supplement the work you put in, not replace it. Using AI and automated platforms to do all the work is a level of laziness that just isn't acceptable, and your audience will see right through it. Also, remember that whatever you're using, everybody else is probably using it as well. Technology is only a tool; its effectiveness depends on how well you use it. These programmes are replaceable, but the human touch and personalisation you bring are invaluable. It's a slippery slope to start looking at people as numbers, and you never want it to reach that point.

Furthermore, platforms and regulatory bodies are always catching up with AI and automation software. Pushing these limits is not a good idea. You're likely to get yourself restricted or banned from platforms or worse, you could build yourself a bad reputation as a spammer. There's an ethical way to use all these tools. Don't abuse them.

Create bibles

Business growth is an ever-moving goal post. The aim is always to partner with more people, create more connections, and expand your efforts. With that in mind, knowledge retention and continuity are paramount, especially if you're going to be bringing other people on board. To maintain top-tier quality throughout, systems must be put in place. Internal bibles are a must-have for any growing team or company. They're readily accessible references to everything from your connections, targets, tools, standard operating procedures, and everything relevant to your business. Rule of thumb: if you're suddenly out of commission, can someone else easily pick up where you left off?

Be flexible with your tools and platforms

Do not fall in love with a specific tool. One may work miracles for you with one event and spit out cobwebs the next. Vary your usage across different platforms, and always be on the lookout for the next innovation. Something better will always come out, so never feel content with the tools you have.



Try something new

Having a routine and set process is vital for any task. But keep it fresh and constantly revisit and reevaluate how you're going about things. Stagnation and complacency are the enemies of success, and the moment you think you've got a winning strategy locked down is the moment you start falling behind.



Remember retention

No, an RSVP does not automatically mean your invitee will be there. In an ideal world, it would, but sadly, such is not the case. These are very busy people, and your event might fall through the cracks despite their interest. One of the most disappointing scenarios in event planning is expecting a full room, only to find that the attendees could comfortably fit in a diner booth. While intimate gatherings can be valuable, this mismatch between expectations and reality can leave a negative impression on both you and your guests. Although it's impossible to predict attendance with certainty until the event day, you can take steps to turn the odds in your favour.

Engage and inquire

A short pre-event survey can work wonders for your gathering. It doesn't have to be fancy or complicated; just a series of relevant questions for your RSVPs will suffice. Sending these out before the event offers several benefits. First, it helps gauge your guests' interests and their companies' current status. The responses provide you, the moderator, and any speakers with valuable insights into where the guests stand on the topic at hand. Questions can range from technical details, like the percentage of workloads migrated to the cloud, to more subjective queries, such as opinions on how well their company supports its employees. Ultimately, it all depends on what you hope to achieve from your event and your audience.

Secondly, and maybe more importantly, this is an inoffensive, professional reminder of your upcoming event - essentially saying 'Hey, remember our event!' Retention is crucial for ensuring that attendees actually show up on the day, so frequent reminders are beneficial. Even if they end up skipping the questions altogether, just appearing in their inbox reinforces you and your event's presence. However, if you're looking for actual answers, keep your questions straightforward. Opt for simple multiple-choice or yes-or-no questions. This way, you're standardising the responses, and you're actually getting answers instead of eye rolls and groans.

Pro tip: Ask them what they want to ask the other guests. This will help you guide the conversation to where guests want it to go. This also adds another layer of personalisation as guests are somewhat handed the reins to the conversation. A few extra brownie points never hurt.

Put a face to the name

Connect with your guests before the event. Brand recognition is vital, but your personal brand matters, too. Whether it's through gentle reminders, social media interactions, or casual conversation, it's best to start building that relationship as early as possible. Finally meeting them face-to-face should be done with familiarity. However, if for whatever reason it's not you coming to the event, make sure they're building this connection prior to this event as well, whether it's your boss, colleague, or partner attending.

Stay top-of-mind

Keep engagement up until the event. In the weeks or days leading up to the event, engage whenever possible. Ask if they're in need of parking at the venue. Interact with their posts. Send a calendar invitation. Ask them if they have any dietary restrictions for the meal. Whatever it may be, keep your event in their thoughts.

Break protocol

You may have found a way that works for you, but this won't always be applicable to every region or person. Again, don't be afraid to veer away from your standard. There is no set formula for outreach. Some guests will greatly appreciate you checking up on their availability. Some will absolutely hate it. Some guests are religious about their emails. Some only clear their chat boxes. A bespoke approach is always the best path to success, but remember to always learn the rules before you break them.

The guest list done right

Curating your guest list is one of the most impactful parts of organising an event. While it may feel like a delicate task, approaching it thoughtfully ensures your event is set up for success. Sometimes, you might need to make tough decisions about who to invite. Perhaps someone is a competitor, or they might lack the relevant experience to feel comfortable and engaged during the discussion. Whatever the reason, focusing on creating the right mix of attendees helps foster meaningful connections and a productive atmosphere. With care and clarity, you can make these decisions in a way that benefits everyone involved.

Thoughtful guest selection

Curating the perfect guest list is an essential step in creating a truly impactful event. By being intentional and selective, you ensure that every attendee is aligned with the purpose of the gathering and positioned to contribute meaningfully.

Thoughtful selection fosters a dynamic environment where discussions flow naturally, connections flourish, and everyone feels comfortable and engaged. This isn't about simply filling seats; it's about bringing together the best possible mix of individuals to create an unforgettable and impactful experience. With careful curation and clear intent, your event will leave a lasting impression.

Guidelines for curating your perfect guest list

Crafting the ideal guest list requires careful thought and communication to ensure the event achieves its full potential. When last-minute adjustments are needed to maintain the perfect mix of attendees, it's essential to communicate changes with transparency and warmth.

Begin by expressing sincere gratitude for their interest and the value you place on your relationship. Gently explain that, for this specific occasion, the guest list has been thoughtfully curated to create the most engaging and aligned experience for everyone. Reassure them that there will be future opportunities better suited to their expertise and interests, and invite them to upcoming events with enthusiasm. If they've made significant efforts, like booking travel, show appreciation by offering to cover costs or extending an invitation for a future occasion.

After the initial conversation, it's essential to send a professional follow-up note to confirm the change in plans and provide clarity. By handling such situations with care and attention, you can ensure that everyone feels valued and appreciated, even when adjustments to the guest list are required.









It was great to meet everyone. I felt a sense of camaraderie and being in a collective during the event. I would love the opportunity to continue our conversations and dive deep into each of the core topics discussed.

| the event

THE ART OF NETWORKING

The programme

Networking

Begin your program with a networking session of about 30 minutes to allow guests to arrive. While we often hear clichés about punctuality, the reality is that people have busy schedules, and you should never assume everyone will be on time. This initial time not only prevents latecomers from disrupting the start of the discussion but also gives your guests the opportunity to mingle and connect before the event officially begins. Keep in mind that different regions may also have distinctive attitudes towards punctuality. Moreover, this period allows you and your moderator to observe the group dynamics, identifying outgoing and reserved individuals. This knowledge will help you decide whom to engage when the conversation lulls or when a few participants dominate the discussion. Additionally, consider informing guests in advance that you'll be inviting them to share their thoughts; giving them time to prepare specific ideas is always beneficial.

The welcome address

Set the stage of the discussion by introducing yourself, the host, and the topic of conversation for your event. Remember to acknowledge the presence of your co-host, if any, and thank them for collaborating with you to make the event possible. Set expectations for the discussion as well by laying out the agenda of the event and the guidelines your participants must follow throughout their conversation. It's important to mention specific times, e.g. when the meal will be served, when the discussion is expected to end, when your reservation will end. Be respectful of your guests' time, and this way, they can manage their expectations and plan the rest of their days accordingly.

The discussion

Don't overestimate the human attention span. Try to limit your discussion time to around an hour and a half. Go too short, and the discussion may not cover all the most constructive parts of the topic. Taking too long, and your guests might get tired or bored. It's better to leave some room for the conversation to continue beyond the structured agenda, as that's when the best networking happens. The topic you've set is meant to be a thought-provoking conversation-starter, so leave people with the freedom to take the conversation where they find most interesting.



Avoid slides and presentations

A concise slide deck welcoming attendees might seem like a good idea, but it's essential to keep the event feeling as organic as possible. If you choose to use a short deck, ensure it adds value. While it may be tempting to promote yourself, remember that the focus should be on the attendees and their experience. Have it be about the topic, what they can expect, and the conversation they're about to have. Guests don't want to feel like they're being presented or, worse, pitched to, when they signed up for an intimate dinner. Foster free-flowing discussion at your event, rather than just working towards fulfilling your agenda. Not to mention, it can be distracting. It's like having a phone out; any small detail can derail your guests' train of thought, and before they know it, they've missed five minutes' worth of discussion.



Maintaining a smooth flow

As a host, you may encounter situations during your event that require immediate yet subtle resolutions that won't attract the attention of your guests. Here are some examples:

Fewer guests than expected

Half of your guests do not show up for the event. Before starting the roundtable, encourage your moderator to invite those in attendance to share as many insights as they can, thus reducing lengthy silences throughout the conversation. You will also want to remove any spare seats.

A surprise attendee

An individual who isn't on your final guest list arrives. Inform them that the seats at your roundtable have already been confirmed and that you can no longer accommodate any unexpected newcomers. Apologise for any inconvenience caused and let them know they're welcome to join your future events. Keep a welcoming attitude and accommodate their inquiries and requests to be maintain a positive relationship.

Fashionably late guests

A guest arrives in the middle of the discussion. Avoid calling attention to their arrival. Once they've settled in, take the time to acknowledge them, show appreciation, and catch them up on the discussion, even briefly. Then, invite them to introduce themselves and share their thoughts on the matter at hand.



Going overtime

The conversation goes beyond the allotted time. This usually happens when participants show great enthusiasm and interest in the topic you've provided. Trust that your selected moderator can smoothly bring the conversation to a satisfying close. Once the formal discussion has ended, invite your guests to continue where they left off by encouraging them to connect with one another post-event on social media.

Where's the food?

The food arrives late. As the host, you must inform your guests about any delays in the serving of their courses. Apologise for this inconvenience and be transparent about the expected wait. It's also important to encourage them to continue the conversation as they wait for their meals to be served.



I would never have thought that we could turn a dry subject like security and password access into one of the most fun and imaginative visions for the future in regard to access rights and security measures in our valuable network and systems. One thing is for sure. I could not have had that kind of interaction and intelligent exchange without such a dynamic group of executives sitting at this virtual table.

The main course

Try to hold off on the main course until the closing of the discussion. Canapés or appetisers might be good to have during the conversation, but not the pièce de résistance. First, placing a plate full of food in front of participants can divert their attention away from the discussion. Second, no one wants to witness bits of beef and fish flying out of everyone's mouths during the conversation.

Closing remarks

Your event is coming to a close. It's common courtesy to give closing remarks and make your guests feel appreciated for taking the time to attend your event. Remember to let them know how to reach you. You or your moderator should also be summarising the key points at this stage. This ensures that your guests are leaving with something of value, reassuring them that they've made the right choice in attending your event. Bring the event to its conclusion, but don't make it abrupt. Presumably, your guests are tired and full, so let them wind down, loosen their belts, and mingle a bit more. At this point, the last thing you want them to feel is that you're kicking them out because you've gotten what you wanted. This is only the beginning of getting to know them better and building long-lasting relationships.

A call to action

It's critical that you have a call to action. The end of the event is not the end of the connection, so ask your guests to keep in touch. Tell them to expect to be tagged on a post on LinkedIn. Inform them of any plans you have for another event and gauge their interest. Make sure you leave that avenue for future conversations open.



Add to the experience

The power of a roundtable discussion is substantial, but it doesn't, and shouldn't, end there. There are countless ways you can add to your event. Of course, you don't want anything distracting your attendees from your roundtable, but add-ons can complement the event and contribute greatly to your guests' experience. Listed in this chapter are some of our favourite ways to make our events more memorable.

Live illustrations

Having a live illustrator present at the discussion, listening in and bringing thoughts and ideas to life could be an engaging idea. Participants could watch as the points they make are made visual in real time. As the illustrations are purely based on the participants' input, each and every piece is unique to its respective event. Two roundtables can have the same topic with leaders from the same industry, but the mind maps will surely differ as each guest has their own set of experiences and insights. It's always a delight for guests to see their thoughts drawn right in front of them. As they're waiting for their turn to speak, they can watch the creatives appear without getting distracted from the conversation or instead of checking their phones. Plus, the finished product never fails to garner oohs and ahs from the guests.

Curated insights

Create a concise report or paper summarising the discussion. Highlight key points in an engaging and easily digestible format. You can also conduct additional research to provide further insights, ensuring your guests gain even more value from the event. This also gives you another great opportunity to stay in touch post-event. These insights have the potential to be shared widely within companies, among colleagues, and on social media. This is great for establishing yourself as a thought leader as well as spreading the word about what you do.

Pro tip: If you're planning on mentioning individuals in your report, make sure you get consent. Some people would rather stay anonymous. Some, on the other hand, love being included in these types of content. The latter will also help you in spreading the word, and you'll likely have an advocate in them.

AI & CX: REDEFINING CUSTOMER EXPERIENCES and PRODUCTS



NAVIGATING AI RISK & COMPLIANCE: The EVOLVING ROLE of MANAGED OPERATIONS



SOLVING GEN AI'S GREAT CHALLENGE: EVALUATING your LLM in PRODUCTION



DRIVE DATA EXCELLENCE: MASTER GOVERNANCE for QUALITY & TRUST



Gifts

With increasing environmental awareness, the last thing you want is for your guests to feel compelled to toss another piece of plastic (or unwanted merch) in the trash. A generic, overly branded gift could harm your guests' perception of your brand so consider your options thoughtfully.



Begin by simply asking participants if they would like to receive a gift, giving them the option to politely decline. Select items that resonate with their personal or professional routines and serve as a reminder of their experience at your event. Thoughtfully tailored gifts not only avoid becoming unused clutter but also ensure your brand is associated with meaningful connections and insights. Merchandise linked to your values, event theme, or topic reinforces the positive aspect of the event experience. Personalising your gifts can then make the gesture even more memorable and impactful.

An official photographer or videographer

Having someone official to document your event may seem more like an added expense than an experiential add-on, but don't underestimate what a good photographer can do for you and your guests. It's a shared experience: everyone loves a good photo of themselves. This also increases the chances that they'll be clicking that 'share' button once they see your post featuring their photo. But once again, make sure you get their consent before using their images for your content.

A tasting session

This is an especially versatile one. You have a whole host of options to choose from: whiskey, chocolate, sake, wine, tea, cheese—the list goes on. For some, this experience alone is worth attending. Plus, this is something you can even arrange for virtual events, with businesses around the world offering door-to-door services.

A car service

One of the biggest pain points for events, especially post-COVID, is transportation. It's one of the most likely reasons someone would either decline or decide not to show up at the last minute; They're too tired to drive, the commute is too long, they don't want to worry about parking, or they can't get a taxi. Consider arranging for pick-up services to not only solve your guests' problem, but they'll also feel taken care of and valued.

| following | through

THE ART OF NETWORKING



What's next?

Your event is over. You've got a few more contacts that will remember your name and the experience you gave them. It doesn't end here. What you've done is create an opportunity for yourself. Circle back to the goals you set at the beginning of this undertaking. Were you able to create a potential business partnership? Did you gain valuable connections? Were you able to lay a foundation for a community? Post-event action is vital. Without this, then all your effort in preparing and hosting your event will be wasted.

Maintain the connection

Connect online! Not just between you and the participants, but connect your guests with each other. Make a WhatsApp group, add them on LinkedIn, follow them on Instagram. When it's time for your next roundtable, you can skip the formalities of a painstakingly constructed email and awkward reintroductions. Shoot them a DM, and if they remember you, you'll get a quick response.

Make some noise

Don't just let people know about your event, have them talking about it. Write thoughtful content about the event, share photos and videos, get the word out—be active. This way, you remain visible to your guests well after your event. Without this, they might soon forget you ever made contact in the first place. Show people how much of a success your event was on social media for everyone who wasn't there. Make your guests feel proud to have been there. By making shareable and interesting content, your guests become your ambassadors. Make people long for the opportunity to have attended, and securing guests will become noticeably easier with each iteration.

Take the next step

With the discussion done, you can now gauge if you can solve their problem. If you see potential for business, now's the time to start collaborating. Set up a simple one-on-one call or a conversation over coffee to further explore the opportunities on the table. Do this in a natural and insightful way as making the impression that business is all you were after is a red flag. Build on what they shared during the discussion. You have the insight and background information sourced straight from the horse's mouth, so this is a golden opportunity you can't let pass.

Know when to stop

Everyone knows that sales is a game of persistence, but it's not the be-all and end-all. For some, the discussion is all they want and all they ever will want. While it's your job to convince them that they want or need more, you will have to know where to draw the line. Even if the potential for great things is staring you right in the face, some people will just not see it. It's better to leave things in a good place, maintain a healthy connection, and move on rather than ruining a relationship with insistent requests to do business.

Less than perfect

It's tough to admit, but some things are out of our control, and things may not go the way we planned. A string of no-shows, inclement weather, or guests who just don't see eye to eye are just a few reasons why your event may get derailed.

Avoid sugar coating

While you don't want to point out things that might have flown under your guests' radar, like the main course being overcooked or the AC being cranked too high, be honest. Acknowledge what was unavoidable, and take accountability for what was within your control. You don't want them thinking that you have low standards by celebrating a substandard event as a resounding success. Apologise and make it clear that you hold yourself to a high standard and that you expect that standard to be met going forward.

Salvage the salvageable

Don't throw all your effort in the bin. It's easy to just hide in shame and move on, but things are often less dire than they seem. Find ways to make the most out of the hand you're dealt. If anything, this should drive you to do better by them next time around, and aim to get the opportunity to try and prove yourself as an able host and event organiser.

Keep your doors open

What if it's not your event that came up short, but your guest? Not everyone is going to be a perfect fit for you or your table. Even so, keep that connection alive and well. While they may not be in the position to create value for you now, who's to say they won't be in a few years? It's easy to label someone as not worth your time, but treat everyone equally. It's basic courtesy. Plus, you should assume that everyone's connecting with everyone else one way or another. You don't want someone you want to establish a burgeoning connection with to hear from another guest that you've been ignoring them. There's no point in burning bridges that don't need to be burnt.



Maintain momentum

Get started on your next event. Learn from your mistakes and find ways to improve. Keep on growing your network and building your brand. There are no diminishing returns here. On the contrary, the value is in the constant reiteration. Running more events and being consistent about it can only stand to benefit you, as your name gains weight and you gain access to increasingly prominent and experienced people. Networking is an endless journey, and its potential is limitless.



*What a great event and evening.
I learned so much. The photos
prove that amongst the solid
discussion and exchanges, there
were some laughs and great
food. It was a solid choice of
venue, menu, and participants.*





We need to lean into getting into those conversations, whether it's operations, finance, or data, and also earning and keeping our seat at the table by demonstrating our understanding of the business and how we marketers can help add value.



About The Ortus Club

The days of hoarding information for competitive edge are behind us; companies now recognise that knowledge sharing is not a zero-sum game. Instead, fostering partnerships and exchanging insights leads to mutual growth and innovation, benefiting everyone involved.

Since 2015, The Ortus Club has partnered with hundreds of hosts, including tech giants like Google and Amazon, and industry leaders such as Cloudflare and Adobe, to create an environment of knowledge sharing. The focus of these discussions has always been on the guests. The Ortus Club takes pride in creating pitch-free environments where attendees aren't pressured to make purchases in exchange for solutions. Our hosts, as experts in their respective fields, are there to listen, share insights, be challenged, and offer advice. While having industry experts as speakers and moderators helps maintain engagement, the real goal is to spark meaningful dialogue. 'How do peers in different industries and companies deal with similar challenges?' that's the question driving every conversation.

Going beyond knowledge sharing, small-scale networking events are now a mainstay in B2B marketing. The pitch-free and open nature of these events make for the perfect, intimate environment for clients and guests to connect as colleagues outside of the usual seller-buyer relationship. In contrast to the run-of-the-mill cold calls and emails, where a sale is the first thing on the mind of all parties involved, The Ortus Club events provides a warm outreach, further enhanced by the fact that providers already know the specific challenges their potential customers are facing.

From day one, The Ortus Club has balanced the goals and interests of both hosts and guests, striving to provide the ultimate environment for constructive knowledge sharing and mutual growth.

Contributors

This guide was put together by the team at **The Ortus Club, Executive Knowledge-Sharing**. It was a collective effort to bring almost a decade of experience into one short and concise guide. We would like to thank our team for contributing their experiences throughout the years.

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