

FUTUROOT

Playbook: Executive Roundtable

A guide to exchange of practical experience, and meaningful follow-up conversations.



1. Playbook: Executive Roundtable

Roundtables bring together industry practitioners, business leaders and subject matter experts to discuss business challenges, industry trends and transformation initiatives in a collaborative setting. Unlike webinars, roundtables are discussion-led and participant-driven. The objective is peer learning, the exchange of practical experience, and meaningful follow-up conversations.

A successful roundtable begins long before the event itself. With capacity limited to 10–20 executives, every interaction in the campaign is an opportunity to build a relationship.

Phase 1 - Planning & Alignment (4 weeks before)

Define the event

- Select 2–3 discussion themes. The best themes come from recurring customer conversations, industry trends, or challenges raised in pre-sales engagements. The topic should feel relevant enough that participants want to contribute.
- Confirm the event objective
- Finalise the date and venue. Breakfast (8:30–10:30 AM) works well for senior finance audiences.
- Identify hosts and speakers: 4–6 hosts are ideal - 2–3 from the partner and 2–3 from FUTUROOT.

Align responsibilities upfront

- Registration page ownership (partner, FUTUROOT, usually through a third-party platform such as Luma).
- Marketing ownership and the lead-sharing responsibilities.
- Co-branding guidelines - use the approved template kit.

Create event assets

- Registration landing page: event title, overview, brief agenda, speaker and host profiles, date, time, venue, and the sign-up link.
- Co-branded event banner and LinkedIn creative (see Section 7 for creative standards).
- CRM invitation email (template in Section 6).

Phase 2 - Promotion (3 weeks before)

Launch the invitation campaign in this order: personal outreach from hosts first (personal emails from Partners / speakers to clients recognising their partnership & expertise for the topic and an opportunity to network with peers is the most assured way for signup success & attendance), then the CRM invitation campaign. LinkedIn announcement posts should be launched from the start and last the duration and beyond the roundtable.

Email campaign timeline

Timing	Email	Audience	Purpose
3–4 weeks before	Event launch invitation	Full target segment	Introduce the event and the business problem being discussed; clear registration link
1–2 weeks before	Registration reminder	Non-registrants who opened or clicked	Create urgency without appearing promotional: topic, speakers, limited seating, closing date
3–4 days before	Attendee confirmation & final push for sign ups	Registered attendees	Date, time, venue, parking or joining instructions, agenda, speaker introductions, contact for queries
1 day before	Final registration review	Strategic non-confirmed prospects	A personal reminder from the host or account manager - often converts high-value prospects

After the launch email, track four engagement groups: registered; clicked but did not register; opened but did not click; did not engage. These behavioural signals reveal intent and tell you exactly where to focus personal outreach.

Personal outreach

- For high-value prospects who opened or clicked but haven't registered: connect on LinkedIn with a short, personalised message referencing the event.
- For strategic accounts: a direct email or phone call from the account owner.
- The objective is not to persuade - it is to make the invitation personal and relevant.

Social media cadence

Plan six posts across the four weeks (see Section 7 for the full cadence and creative standards): event announcement, host introductions across weeks 1–3, then an event reminder and a registration urgency post in the final week.

Host videos (recommended)

Each host records a 30–45 second video: who they are, what the event is, what the conversation will cover, why someone should come, and how to register. Two options - self-record on a phone in selfie mode with natural light and a quiet background or send a voice note plus headshot and FUTUROOT will produce the video. No camera required.

Phase 3 - Rehearsal & Final Checks (5–2 days before)

- Agree agenda & flow 3-4 weeks before. Plan at least 2 meetings with key stakeholders to align

- Brief respective team to create content to support discussion and any demo environments required. Discuss any online poll questions and system to use (e.g. Kahoot), Design any slides (minimum) to support the discussion.
- Run 1–2 rehearsals covering opening remarks, discussion flow, speaker transitions, the demonstration storyline (if used) and timing.
- If helpful, have colleagues play participants and ask likely questions to test the flow and identify where stronger moderation may be needed.
- Confirm catering requirements and tech requirements

Phase 4 - Event Day

- Final logistics: Arrive at least 90 min before start time and ensure AV tested, Wi-Fi available, catering set up, registration list prepared, demo environment tested.
- Facilitator Notes: Ask open questions, involve quieter participants, and don't let one voice dominate.
- Importantly, assign 1 team member to capture themes, questions and standout quotes as you go - they become the raw material for the post-event campaign.

Phase 5 - Post-Event (within 48 hours and beyond)

The conversation shouldn't end when the roundtable finishes. Run the full post-event email sequence in Section 6.5 - it engages four audiences in turn: attendees, your wider CRM database, other partners, and future event registrants.

- Update the event landing page with key takeaways, session learnings, additional resources and references mentioned during the discussion.
- Send the Key Learnings Roundup to attendees within 24–48 hours, linking to the updated page.
- Send the CRM insights email to the wider database 3–5 days later, and the partner co-hosting email on a less frequent cycle.
- Hold an internal debrief attendance, hot leads, key discussion themes, attendee feedback, lessons learned.