

CEO Networking Forum

How to Generate Warm, Referral-Based Leads from Local CEOs Without Pitching, Presenting, or Hosting Boring Events

PART 1: THE CONCEPT

What Is a CEO Networking Forum?

A CEO Networking Forum is a small, invite-only, moderated discussion event where you bring 5–7 of your best clients together — each required to bring one guest — for a 90-minute to 2-hour conversation on a hot business topic.

It is not a lunch and learn. It is not a seminar. It is not a sales presentation dressed up with free sandwiches.

It is a relationship strategy that happens to use a lunch or dinner.

The Promise

The Core Promise

A single 2-hour event that delivers 5–7 warm, pre-qualified leads — every time.

No cold outreach. No boring presentation. No awkward sales pitch.
No begging for referrals. No sleepless nights wondering if anyone will show up.

Just a room full of business owners who came because your best clients invited them — and who just spent two hours watching you run the room.

The Math

5–7 clients + 1 guest each = 5–7 warm leads who already trust someone in the room.

At scale: one rep, running one forum per month, generates 60–84 warm leads per year — from events that cost almost nothing and run on relationship capital you already have.

Why It Works: The Psychology

Traditional events say: "Come learn about what we do."

CEO Networking Forums say: "Come discuss [hot topic] with other successful business owners."

What's in it for attendees:

- Connect with peers they actually want to know
- Learn what other businesses are doing right now
- Get ideas they can use immediately
- Feel important, included, and selected — not marketed to

You stop being a vendor. You become a connector. Connectors are trusted more than presenters.

Traditional Events vs. CEO Networking Forum

Traditional Lunch & Learn/Big Event	CEO Networking Forum
You present, they listen	They talk, you moderate
Feels like a sales pitch	Feels like an exclusive peer group
Attendees are strangers	Attendees are vouched for by clients
Hard to fill the room	5–7 people is easy to confirm
One-way presentation	Real conversation with real insights
You chase leads after	Leads come pre-warmed
Massive time/money risk	Low cost, low risk, repeatable
One-and-done	Scalable monthly series

Origin: How This Strategy Was Discovered

This concept was validated through two sources: a HubSpot AI dinner at Jeff Ruby's Steakhouse in Nashville (a moderated roundtable that generated real connections without a single pitch), and a conversation with an MSP that transformed their entire growth strategy around it.

The MSP Case Study

An MSP with 200 clients and 4 account managers was running big quarterly events (50–80 people). They always got some business but couldn't scale it — too much planning, too much risk, too much variability in results.

After implementing the CEO Networking Forum model:

- Each of their 4 reps started running their own forum quarterly
- Quarterly became monthly once they saw results
- Each forum: 5–7 clients + the guests they brought
- After 6 months and ~20 forums, they called back to report: "This is our entire 2026 marketing plan"

The Scaling Math

1 forum per rep per month
4 reps × 5 warm leads per forum = 20 leads/month
20 leads × 12 months = 240+ warm leads per year

Low cost. High trust. Fully repeatable.

The Barbell Theory

The philosophy behind this approach: go all-in on AI so you can go all-in on human.

Use AI to automate content, emails, and admin work — so your team can spend more time on high-touch, in-person relationship building. The more high-tech the world becomes, the more high-touch people want.

CEO Networking Forums are the human side of that barbell.

PART 2: PLANNING YOUR FORUM

Step 1: Choose Your Theme

The theme is your hook. It needs to be timely, universal, and discussion-friendly — no single "right answer," something business owners are actively thinking about.

Hot themes right now:

- AI for Small Business: What's Real, What's Hype
- Hiring & Keeping Good People in 2026 (hiring, training, retention, compensation)
- Cybersecurity: What Owners Actually Need to Know
- Scaling Without Losing Your Culture
- Marketing & Sales: What's Actually Working Right Now

Naming Formula

CEO Networking Forum: [Topic] for [Audience] in [City]

- ✗ "Lunch and Learn on Compliance"
- ✓ "CEO Networking Forum: Practical AI for Local Business in Nashville"
- ✓ "CEO Networking Forum: Hiring & Retention for Business Owners in Denver"

Note on niche-specific forums: You can target a specific industry (e.g., dental practices), but be upfront that attendees may know each other. The added benefit is hyper-relevant discussion. Just acknowledge it: "We know some of you may view each other as competition, but we believe the right 10 people can all walk away better."

Step 2: Pick Your Date, Time & Venue

Timing Options

Lunch (11:30am - 1:30pm)	Happy Hour (4:00pm - 6:00pm)
Easy to schedule — people eat anyway	More relaxed, social atmosphere
Feels productive for busy CEOs	Conversations naturally run longer
People feel pressure to return to work	Higher perceived value (drinks + food)
Lower cost per person	Slightly higher cost per person
Good for first-time events	Better for ongoing series / deeper relationships

Recommendation: Start with lunch to keep it easy. Shift to happy hour as the series matures.

Venue:

- Use a private dining room at a local restaurant — not your office
- Offices feel transactional; restaurants feel like hospitality
- A private room keeps conversations focused and confidential
- Budget \$30–50/person for lunch; \$50–75 for happy hour

Step 3: Curate Your Client List

You need 5–7 clients who will each bring a guest. Target 8–10 invites to account for scheduling conflicts.

Ideal Client Profile

- **Decision-maker:** Owner, CEO, or president — not an office manager or IT contact
- **Sweet spot size:** Companies with 15–50 employees (adjust to your ICP)
- **Tenure:** Has been a client for at least 6 months — they know and trust you
- **Connected:** Knows other business owners in the community
- **Contributor:** Would actually talk and add to the discussion

Clients to Avoid

- **Complainers:** The last thing you want is a client who talks about your company's flaws in front of prospects
- **Disconnected:** People who don't know other business owners and can't bring a quality guest
- **No-shows:** If they've flaked on other commitments, don't gamble with a small intimate event
- **Non-participants:** Very introverted clients unlikely to contribute to conversation

PART 3: THE INVITE

The Golden Rule

CEOs don't "attend" things. They get invited. They get selected.

Make the invite feel like a privilege, not a marketing pitch.

Do it by phone or in person — not just email.

Client Invite Script (Phone)

SCRIPT: Client Invite — Phone Call

"Hey [Name], I'm hosting a small CEO forum for business owners to discuss [topic].

The idea is to get business leaders in the community together to [outcome — e.g., share how they're using AI, swap ideas on hiring, etc.]. I immediately thought of you because [specific reason tied to their business].

We're hosting this at [location], providing [lunch/drinks], and keeping it to just 12 people. If you can attend, all we ask is that you bring one other business owner you respect — someone who'd get value from the conversation or have something to add.

Interested?"

Key phrase: "Someone you respect." This filters out tire-kickers and low-quality guests without you having to say that.

Handling Hesitation

SCRIPT: If They Hesitate

"Totally get it. It's a small group — just 10–12 people — so it's really more of a conversation than an event. No presentations, no pitches. Just business owners talking about [topic].

If it's not the right time, no pressure at all. But I'd love to have you if you can make it."

SCRIPT: If They Can't Bring Someone

"No problem at all. If you think of someone between now and [date], just let me know. And if not, I'd still love to have you there — the conversation will be valuable either way."

NOTE: Don't make this the norm. The 'bring a guest' mechanic is core to the model.

One or two exceptions are fine; more than that undermines the strategy.

Follow-Up After They Say Yes

SCRIPT: Confirmation Text or Email

"Subject: CEO Forum on [DATE] — details + one ask

Hey [Name],

Thanks for saying yes to the CEO Forum on [DATE]. Here are the details:

What: CEO Networking Forum: [TOPIC]

When: [DATE], [TIME]

Where: [VENUE + ADDRESS]

One ask: Start thinking about one other business owner you respect who'd get value from this.

Ideally someone with 15–50 employees in the [AREA] area. Not a direct competitor of anyone at the table.

I'll follow up in a few days to get their name and contact info.

[Your name]

Getting the Guest Name

SCRIPT: Follow-Up Call — Getting Guest Info

"Hey [Name], just following up on the CEO Forum. Have you had a chance to think about who you'd want to bring?"

[Wait for answer]

"Great, what's their name and company? ... Perfect. I'll reach out to them directly to get them the details and make sure they're a good fit. Thanks for thinking of them."

Guest Criteria Script (What to Tell Your Clients)

SCRIPT: Guest Criteria

"Think about another business owner you respect — maybe someone from a networking group, a vendor you like working with, or a friend who runs a company.

Ideally:

- Business owner, CEO, or president (a decision-maker)
- Company with 15–50 employees
- In the [CITY/AREA] area
- Not a direct competitor of yours or anyone else at the table
- Someone who'd actually add to the conversation

The kind of person you'd want to grab lunch with anyway."

Direct Outreach to Guests

Once you have the guest's name, reach out directly — don't leave it entirely to your client. A personal call or email from you reinforces the exclusivity of the invitation.

SCRIPT: Guest Outreach — Email

Subject: [Client Name] thought you'd be a great fit

Hi [Guest Name],

[Client Name] mentioned you when I was putting together a small CEO forum, and I wanted to reach out personally.

I'm hosting CEO Networking Forum: [TOPIC] — a 90-minute discussion with 10–12 business owners. No presentations, no sales pitches. Just a real conversation among peers about what's working and what's not.

Details:

When: [DATE], [TIME]

Where: [VENUE]

Who: Local business owners (15–50 employees)

[Client Name] will be there, along with a few other owners I think you'd enjoy meeting.

Interested? Happy to jump on a quick call or answer any questions.

Reminder Email (2–3 Days Before)

SCRIPT: Reminder Email

Subject: See you [DAY] — CEO Forum details

Hi [Name],

Quick reminder that the CEO Networking Forum is [DAY] at [TIME] at [VENUE].

If you haven't filled out the short survey yet, here's the link: [LINK]

See you there,
[Your Name]

PART 4: PRE-EVENT PREPARATION

The Pre-Event Survey

Send 5–7 days before the event. Serves three purposes: gets attendees thinking about the topic, gives you discussion material, and gives you content for your introductions.

Keep it short — 3 minutes maximum to complete.

Survey Questions — AI Theme

- How are you currently using AI in your business? (Or what would you like to use it for?)
- What's your biggest question or concern about AI?
- On a scale of 1–10, how AI-ready do you feel your business is right now?
- What would you most want to learn from other business owners on this topic?

Survey Questions — Hiring & Retention Theme

- What's your biggest people challenge right now — hiring, training, retention, or compensation?
- What's one thing you've tried that actually worked?
- What's one thing you wish you knew three years ago about building a team?
- What topic would you most want the group to spend time on?

Survey Questions — Hiring & Retention Theme

- How confident are you in your current cybersecurity posture? (1=not at all, 10=very)
- What's your biggest security concern right now?
- Have you experienced any security incidents in the last 2 years?
- What would you most want to understand better about cybersecurity?

AI PROMPT: Generate Discussion Questions

Paste your survey responses into ChatGPT or Claude with this prompt:

"I'm moderating a 90-minute CEO networking forum on [TOPIC] for business owners with 15–50 employees. Here are their survey responses: [PASTE RESPONSES]

Generate 8–10 discussion questions that are open-ended, invite storytelling, range from tactical to strategic, and could spark friendly debate. Also suggest 2–3 warm-up questions to open the session."

Building Attendee Introductions

Do not do self-introductions. They are awkward, uneven, and waste time. You introduce every person — 30–45 seconds each.

Why this works: people never get put on the spot, conversations start on equal footing, and attendees are blown away that you researched them.

Introduction Formual

"[Name] is the [Title] of [Company] — they [one sentence on what the company does]. About [X] employees, been in business [X] years. [One interesting or humanizing fact]. In our pre-survey, [Name] mentioned they're particularly interested in [topic from survey], so I suspect they'll have a lot to add to that part of the conversation."

How to Build Intros Fast

1. Pull their LinkedIn headline and About section
2. Check their company website's About or Team page
3. Note their survey response
4. Paste everything into Claude or ChatGPT with this prompt:

AI PROMPT: Build Attendee Introduction

"Write a 30–45 second introduction to be read aloud at a business networking forum. Tone: professional but warm — like introducing a friend to other friends.

Include: name, title, company name, what the company does (1 sentence), how long in business / size (if known), one humanizing or interesting detail, and what they're hoping to discuss today (from their survey response).

LinkedIn: [PASTE]

Company website: [PASTE]

Survey response: [PASTE]"

Creating Your Discussion Guide

Prepare 6–8 discussion questions. You'll only use 3–4, but having extras gives you flexibility based on how the conversation flows.

Structure questions to range from warm (easy to answer) to deeper (more vulnerable/strategic):

- Opening: something everyone can answer confidently
- Core 1–2: where the real conversation happens
- Closing: forward-looking, what will they do differently

The Agenda

Time	Segment	Notes
0:00	Welcome + ground rules	Thank them, set tone
0:05	Introductions (host-led)	30–45 sec each, ~5 min total
0:10	Host's 30-sec company mention	One time only — then done
0:15	Opening question	Easy, everyone answers
0:25	Discussion Question 1	Let it run if it's hot
0:40	Discussion Question 2	
0:55	Discussion Question 3	Optional based on time
1:10	Takeaways round	One each, highlight group
1:20	Wrap-up + soft CTA	Pre-sell next forum if ready
1:30	End (let conversations flow)	Don't rush people out

Note: "If a topic is valuable, we'll stay there. If it's not, we'll move on. This is your time."
— Say this at the start. It buys enormous goodwill.

PART 5: RUNNING THE FORUM

Your Opening Script

SCRIPT: Welcome & Ground Rules (First 5 Minutes)

"Thank you all for being here — I know you're busy, and I genuinely appreciate you making the time.

Quick housekeeping: this is a conversation, not a presentation. I'm just here to keep us moving and make sure everyone gets a chance to talk.

A few ground rules:

First — there's always one person in a group who has an opinion on everything. If that's you, God bless you. But if I say 'GONG,' that's my polite signal to wrap up so we can hear from someone else.

Second — no sales pitches. We're here to learn, not sell each other. You're welcome to stay after and have those conversations — that's what the time after is for.

Third — what's said here stays here. This is a confidential conversation among peers.

If a topic is hot and we want to stay there, we'll stay. If it runs dry, we'll move on. This is your time — I want to make sure it's worth it.

Okay — let me introduce everyone."

Your 30-Second Company Mention

This is the only time you talk about your company. Do it right after introductions, before the first discussion question. Keep it under 30 seconds.

SCRIPT: Host Company Mention

"Quick background on me — I run [Company]. We help businesses with 15–50 employees use technology to be more profitable, protected, and productive.

But that's not what today is about. I'm here to learn alongside you.

If anything we discuss sparks questions about technology or how it might apply to your business, I'm happy to grab time with you after. But for now — let's dig in."

Moderating the Discussion

Your Three Lanes

As the moderator, you only have three lanes:

- **Ask better questions** — keep the discussion moving with follow-ups
- **Connect dots** — "That's interesting — Sarah said something similar earlier..."
- **Offer anonymized examples** — "I've seen another company handle this by..."

That's it. You are not presenting. You are facilitating.

Handling the Know-It-All

SCRIPT: Redirecting the Talker

Set it up in your ground rules with a code word (GONG or BANANA).

In the moment:

"Great point, [Name]. Let's get some other perspectives — [Other Name], what's your take?"

If they keep going:

"I want to make sure we hear from everyone — [Name], can you land the plane?"

Drawing Out the Quiet Person

SCRIPT: Engaging the Quiet Attendee

"[Name], you've been quiet — and I know you've got a great business. Have you dealt with this? What's worked for you?"

The Wrap-Up

SCRIPT: Closing the Forum

"We're coming up on time. Before we wrap, I'd love to do a quick lightning round — one takeaway each. What's one thing you're walking away with or going to do differently?"

[Go around the table. Highlight contributions — mention names.]

"This has been fantastic. [Highlight 2–3 specific things that came up.]

We're planning to do another one of these in [timeframe] on [possible topic]. If you'd be interested in coming back — or if you know another business owner who'd benefit — let me know.

Stay as long as you'd like. I'd love to connect with each of you."

PART 6: THE FOLLOW-UP

The follow-up is where warm leads become real opportunities. Don't skip it or let it go cold.

Within 24 Hours — Everyone

SCRIPT: Thank-You Email (All Attendees)

Subject: Thank you — [Forum Title] recap

Hi [Name],

Thank you for being part of the [Forum Title] yesterday. The conversation was exactly what I was hoping for — and that's because of the people in the room.

A few highlights from the discussion:

- [Key insight 1]
- [Key insight 2]
- [Key insight 3]

I've attached the group photo — feel free to share. [Or: I'll be sharing it on LinkedIn and will tag everyone if you're connected.]

If anything from the conversation sparked questions about [your area — technology, cybersecurity, etc.], I'm happy to grab time.

Looking forward to the next one.

[Your Name]

Also: post the group photo on LinkedIn. Tag every attendee you're connected with. This generates visibility with their networks and reinforces the event's credibility.

Within 7 Days — Guests / Prospects

This is your highest-leverage follow-up. Be personal. Reference something specific.

SCRIPT: Personal Follow-Up to Guests (No Direct Interest)

Subject: Great meeting you at [Forum Title]

Hi [Name],

Really enjoyed meeting you at the CEO Forum. Your point about [SPECIFIC THING THEY SAID] stuck with me — that was a great insight.

[Client Name] clearly has great taste in people.

If you'd ever want to grab coffee and continue the conversation — about [topic] or anything going on in your business — I'd enjoy that. No agenda, just always looking to connect with sharp business owners in [city].

Let me know if you're up for it.

[Your Name]

SCRIPT: Personal Follow-Up to Guests (Expressed Interest)

Subject: Great meeting you at [Forum Title]

Hi [Name],

Really enjoyed meeting you at the CEO Forum. Your point about [SPECIFIC THING THEY SAID] stuck with me — that was a great insight.

[Client Name] clearly has great taste in people.

If you'd ever want to grab coffee and continue the conversation — about [topic] or anything going on in your business — I'd enjoy that. No agenda, just always looking to connect with sharp business owners in [city].

Let me know if you're up for it.

[Your Name]

Ongoing Nurture

SCRIPT: Invite to Next Forum (Past Attendees)

Subject: You're invited — CEO Forum on [TOPIC]

Hi [Name],

Hope you've been well since our last forum.

I'm putting together the next one and wanted to make sure you had first dibs:

CEO Networking Forum: [TOPIC]
[DATE], [TIME] | [VENUE]

Same format as last time — small group, real conversation, no presentations or pitches.

If you'd like to attend, just reply and I'll add you to the list. And if you know another business owner who'd benefit, feel free to bring them.

[Your Name]

SCRIPT: No-Show Follow-Up

Subject: Missed you yesterday

Hi [Name],

We missed you at the CEO Forum yesterday — hope everything is okay.

The conversation was great. If you'd like, I can send you a quick summary of what we discussed.

We're planning the next one for [DATE] on [TOPIC] — I'll make sure you get the invite.

[Your Name]

PART 7: SCALING THE SYSTEM

From One Event to a Machine

The CEO Networking Forum model is designed to be repeatable. Once you've run two or three, the system runs itself.

Scaling Timeline

Time	Segment	Notes
Month 1–2	Run your first forum. Test the format.	All theme recommended to start
Month 3–4	Run a second forum on a different topic.	Invite some prior guests back
Month 5–6	Go monthly. Build your rotating topic calendar.	Prior attendees become co-invited
Month 7+	Add a second rep running their own forums.	Different client lists, same model
Year 2	Multiple reps, monthly cadence, topic series.	60–240+ warm leads/year

Lead Volume by Scale

Setup	Approximate Annual Warmup Leads
1 forum/quarter (getting started)	~28 leads/year
1 forum/month (building momentum)	~84 leads/year
2 reps × 1 forum/month	~168 leads/year
4 reps × 1 forum/month (full system)	~336 leads/year

Multi-Rep System

The 200-client MSP case study ran this at scale: 4 account managers, each managing ~50 clients, each running 1 forum per month. Every rep:

- Selects 5–7 of their own clients to invite
- Picks a theme relevant to their client mix
- Handles all invitations, prep, and follow-up themselves
- Gets credited for any new business resulting from their forum

The result: account managers love it (real face time with clients), clients feel valued, and the business consistently generates new opportunities without a traditional marketing campaign.

Topic Series Strategy

Run the same broad topic (e.g., AI) across multiple forums over several months. Benefits:

- Inviting different client sets means no overlap in guest lists
- You get better at moderating as you repeat the topic
- Prior guests can be invited back as "veterans" who add depth to future sessions
- You can reference real stories: "At our last AI forum, a manufacturing company shared..."

AI as a topic alone could sustain 2 years of quarterly forums — the landscape changes fast enough that each session is genuinely fresh.

PART 8: IMPLEMENTATION CHECKLISTS

Planning Checklist (4–6 Weeks Out)

- Pick your theme and title
- Select date, time, and venue (book private room)
- Identify 8–10 client candidates to invite
- Make invite calls (phone or in-person, not email)
- Confirm 5–7 clients with guest commitments
- Get guest names and contact info from clients
- Set up pre-event survey (Google Forms or similar)

Preparation Checklist (1–2 Weeks Out)

- Send survey to all confirmed attendees
- Research each attendee (LinkedIn, company website)
- Build 30–45 second introductions for everyone
- Generate discussion questions from survey responses (use AI)
- Create printed discussion guide / agenda
- Send reminder email with survey link
- Confirm headcount with venue

Day-Of Checklist

- Arrive 20–30 minutes early
- Confirm room setup and place settings
- Print attendee list and introduction notes
- Have business cards available (but don't push them)
- Take group photo during / at end of event
- Take notes during discussions — key insights, who said what

Post-Event Checklist

- Send thank-you email to all attendees within 24 hours
- Post group photo on LinkedIn, tag attendees
- Send personalized follow-up to each guest within 7 days
- Reference something specific they said
- Offer coffee with no agenda to top prospects
- Connect on LinkedIn with all guests
- Add guests to your newsletter / nurture list
- Plan your next forum: date, topic, client list

Quick Reference Card

The Ceo Networking Forum - At A Glance

Setup: 5–7 of your best clients, each brings 1 guest

Format: 90-min to 2-hour moderated discussion

Hook: Themed topic (AI, hiring, cybersecurity, etc.)

Invite: Phone or in-person — not email

Key ask: 'Bring someone you respect'

Your role: Moderator, not presenter

Sell: 30-second company mention — then done

Follow-up: 24hrs (group), 7 days (guests, personal)

Result: 5–7 warm leads who just spent 2 hours watching you run the room

This isn't an event strategy.

It's a relationship strategy that happens to use a lunch or dinner.

The spotlight is on them. The credibility sticks to you.

Your first CEO Networking Forum is 30 days away.

Now go fill a room.