



WHEN YOU ARE A PANEL MODERATOR

How to facilitate an engaging discussion.

By Christine Clapp, DTM

Jim Becker, an information technology director who has spent years moderating panels as well as planning meetings and conferences, says, “A great panel moderator is like a great party host, making everyone feel welcome, knowing how to avoid or handle lulls, knowing how to get a conversation going between others, knowing how to rescue someone from an inappropriate or overly long conversation, and knowing how to wrap things up when it’s time for the

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party to end — all done with alertness and diplomacy, and without expecting to be the center of attention.”

Just as an excellent party requires careful preparation, so does an excellent panel. Here is what a moderator can do beforehand to ensure that guests — panelists and the audience — have a positive experience:

1. Analyze the audience: When planning a panel, the moderator or conference planner should identify the target audience and research the needs and interests of audience members. When the panel presents a timely issue that the audience cares about, you set the stage for a popular panel discussion.

2. Select participants: Along with the right topic, select the right panelists to ensure a packed event. Invite thought leaders and newsmakers who have credibility on the issue, as well as an important point of view. Showcase a range of perspectives.

Seek out panelists who are dynamic speakers; the best authorities won’t make good panelists if they aren’t compelling presenters. Similarly, select speakers who are willing to present within the parameters (topic or time

constraints) of the panel. Some high-profile speakers have a stump speech and won’t tailor their presentation for specific audiences and situations. Find someone who will.

Aim high. When you identify the perfect presenter for your panel, extend an invitation. The perfect panelist cannot say “yes” if you don’t ask.

Research and contact one or two potential panelists beyond the number you need, just in case of cancellations. Each industry and conference differs, but most panels have three to five panelists. Strive for balance between breadth and depth — have a range of perspectives and enough time for a thorough discussion. Include time

for questions from the audience, as well as answers from and exchanges among panelists.

3. Confirm and reconfirm: After panelists accept, confirm the time, date and location in writing. Also explain your vision for the panel: what the desired outcome is, why particular panelists are chosen, what each panelist should address to avoid repetition, how long each person should speak and how the question-and-answer session will be handled. Also include any other relevant details on accommodations or registration. To avoid any surprises or competition for the microphone, warn panelists that their comments may be cut short if they exceed their time limits. Ideally, moderators should then schedule a conference call with panelists.

“Some of the best panels I’ve ever seen are where the moderator had a pre-event conference call with all the panelists,” says Sarah Sennett, a marketing executive at The Institution of Engineering and Technology in Stevenage, Hertfordshire, England. “The moderator found the particular strengths and specialties of each panelist within the subject matter, and pre-agreed on a few [subjects to cover] to ensure a balanced debate that sparked lots of questions.” The key is to listen to the suggestions of the panel on your vision for the session. This will ensure the agenda is

REMINDERS FOR PANEL DAY

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After your preparation is complete, follow these steps on the day of the panel.

- ▶ **Arrive early to set up.** Put out an agenda, large name placard and glass of water for each panelist. Test microphones and other technology. Cue slides.
- ▶ **Brief panelists 30 minutes before the panel.** If they are a few minutes late for the briefing, they'll still be on time for the main event. Remind panelists how the session will unfold.
- ▶ **Keep track of time.** If panelists have opening remarks, set clear time limits beforehand. Find a trusted colleague or audience member to serve as the timer. Tell panelists during your briefing who will keep time, how time signals will be displayed and how you will cut off panelists who go over time. Make sure all panelists can see where the timekeeper is sitting and provide cue cards that are large enough for panelists to see (and hard to ignore).
- ▶ **Start on time.** Two minutes before the start of the panel, make an announcement that the session will begin shortly. Then start the program on time. If attendees aren't seated, repeat a pleasantry, such as "good afternoon," several times and with long pauses between each repetition. A loud and enthusiastic greeting will be met with a quick response.
- ▶ **End on time.** No one likes a panel that goes over time. Allow plenty of time for the final question and your wrap-up. Concluding a few minutes early provides time for the audience to complete an evaluation and approach panelists.
- ▶ **Follow up.** After the event, send thank-you notes to the panelists, event organizer, timekeeper and others who helped. Just like a winning party organizer, a gracious panel moderator won't have trouble attracting volunteers to help with future events.

well suited to the panelists and that they are comfortable with the focus of the session.

A few days before show time, reconfirm in writing, going into more logistical detail. Find out what technology, if any, panelists will need. If they are using PowerPoint slides, get them in advance to ensure compatibility and ease of transition. Most importantly, provide the time and location you'd like panelists to meet before

the program, as well as phone numbers where you can be reached up to the last minute.

4. Craft an agenda: Craft a detailed agenda after the conference call, taking the specialties and suggestions of panelists into consideration. List the exact time that each panelist is scheduled to present, as well as time-lines for other agenda items.

Panelists should receive a copy of the agenda ahead of time so

they know what to prepare, such as opening remarks or responses to specific questions that the moderator will ask. Bring a copy for each panelist on the day of the session and put it at his or her assigned seat.

Prepare and bring copies of back-up agendas. For example, one aimed at a session that is 15 or 30 minutes shorter than the time originally allotted. Because conferences often run late, this will allow you to help organizers get back on schedule. Another alternative agenda should account for a session that is one panelist short, so you can adjust for a last-minute cancellation.

5. Write speaking material:

While an agenda makes a good outline of the event in general, the moderator must also prepare what he or she will say at certain points in the panel. This speaking material doesn't have to be scripted. Planned and rehearsed talking points work well. Prepare the following:

▶ **Opening:** Grab the attention of the audience with a relevant fact, statistic, quotation, anecdote or joke. Then welcome the audience, thank panelists, link the opening line to the purpose of the panel, and preview how the panel will unfold. Be explicit about when and how audience members can ask questions. The opening sets the tone for the entire panel; carefully craft and rehearse it until your delivery is smooth and enthusiastic.

▶ **Panelist introductions:** Decide if you will introduce all panelists during the opening, or introduce each panelist right before he or she gives individual opening remarks.

Ask panelists to provide an introduction ahead of time. Most will send a page-long biography that must be shortened and made

relevant to the panel discussion. A good introduction is 30 to 60 seconds long, highlights the most interesting and important aspects of a panelist's credentials and provides a teaser of his or her remarks. An introduction must also include the preferred title and correct pronunciation of each panelist's name and affiliation.

- ▶ **Plan out question session:** Plan in advance how and when you will solicit questions. Seed several questions with trusted audience members ahead of time. Ask one of them to volunteer a straightforward question immediately after you open the floor. This prevents

“Seed several questions with trusted audience members ahead of time to prevent awkward silence.”

awkward silence, encourages others to ask questions and gets panelists comfortable responding. Other seeded questions can be asked during lulls in the discussion. A good moderator has a list of questions prepared so he or she can open new topics of discussion during lulls also.

- ▶ **Conclusion:** Give notice that the panel is coming to a close by calling for the last audience question. After it is answered, pose a broad last question that allows each panelist to offer final thoughts or discuss future trends. Then, thank the panelists, audience, event organizers, and, if appropriate, sponsors for providing a forum and engaging in a discussion on such an important issue. Share additional resources available to attendees and announce future events of interest.

When appropriate, link the conclusion to the catchy statistic or anecdote from your opening. If you have an evaluation form for the session, ask the audience to fill it out and express thanks for the feedback. Finally, if the panel is part of a larger conference, tell attendees what's next on the schedule and give them directions to get there.

- 6. **Prepare to facilitate the discussion:** Judy Hojel, CEO at People and Performance Training Pty Ltd in Sydney, Australia, sums up the moderator's role: “A moderator is there to encourage interactivity

between the audience and the panelists, and among the panelists themselves. The more relaxed they are, the more they encourage others to relax and therefore generate the best outcome from each person.

“Being a good moderator means knowing when to bring in the participation of the audience, as well as knowing when to encourage the panelists to speak to each other,” she adds. Though effective moderators do much of their facilitating on the spot, they can practice the following relevant skills ahead of time:

- ▶ **Listening:** Moderators need to listen carefully to interject follow-up questions, ask related questions of panelists who haven't been as involved in the conversation, and smoothly transition between speakers and topics.
- ▶ **Repeating and reframing:** Moderators must repeat questions

so everyone can hear and panelists have a moment to formulate a response. The moderator reframes questions on a tangential topic and directs each question to a particular panelist with expertise on the specific issue.

- ▶ **Interrupting:** Effective moderators must be skilled at interrupting politely. This is key to keeping the agenda on track when a panelist has gone on too long during opening remarks or an answer to a question. Audience members should be interrupted if they are using floor time to give a speech, not ask a question.

Interrupt kindly by waiting until the speaker is taking a breath or ending a sentence. Thank the speaker for his or her comments and indicate that it is time to move on, such as to the next panelist's opening remarks or another panelist's perspective.

Moderating a panel truly is like hosting a celebration where someone else is the guest of honor. You won't need streamers or cake, but you will need careful preparation and a smooth delivery for everyone to feel comfortable and have a good time. Follow these tips and your panel will be a hit! 📌

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