

Creating, Coordinating, and Moderating a Successful Panel Discussion



2021

Congratulations on your opportunity to create, coordinate, and moderate a panel discussion!

As the coordinator and moderator of your panel discussion, you have the responsibility of ensuring that the time you are asking your panelists and attendees to spend with you is valuable. The following information was put together based on a food industry expert's panel discussion experience. It will walk you through the process of creating, coordinating, and moderating a successful panel discussion, both virtually and in-person.

TIME TO COMPLETE:

- We recommend starting with **30 minutes of focused time** to go through the information in this document. Then schedule out appropriate times for the additional recommended activities to ensure a successful panel discussion event.

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CREATING A SUCCESSFUL PANEL DISCUSSION

We recommend starting the process of creating your panel discussion **at least 6 months** prior to holding the actual panel discussion. This will allow you enough time to work through all of the steps that go into creating, coordinating, and moderating a successful panel discussion.

The purpose of a panel discussion is to offer more than one perspective on a topic. A panel discussion can also strengthen the message you are trying to convey. Instead of one person seeking support, it is stronger when multiple people are speaking to the topic and message.

STEP #1: DETERMINE TYPE OF PANEL DISCUSSION

The first step when creating a panel discussion is to determine if your panel discussion is going to be a roundtable style discussion or a presentation style discussion.

A **roundtable** panel discussion is a discussion forum of 4 – 6 panelists that is no longer than 90 minutes with each panelist giving a 5-6 minute introduction, followed by time for a discussion (1 hour minimum) that includes audience participation. Panelists are not allowed to give presentations and should have no slides (no data projector and will be provided for roundtable sessions). Proposals may be prepared by individual, groups of individuals, committees or professional development groups (PDGs).

- A roundtable discussion's purpose is for the audience to learn from experts and hear different perspectives. It's an opportunity for your panel to share a lot of different approaches to a subject.
- A roundtable discussion is fueled by a series of questions asked by the moderator to the panelists. Robust discussion is encouraged! Then the audience is encouraged to ask questions to promote deeper discussion.

A **presentation** panel discussion is a discussion forum of 4 panelists that is around 60 minutes in length. The moderator introduces the session, then each panelist is given around 10 minutes to present their information, followed by 10 – 15 minutes for questions from the audience and wrap-up comments from the moderator. PowerPoint presentations may be used by the panelists but not encouraged.

- A presentation discussion's purpose is to present different perspectives on a topic with all panelists sharing their own presentation that fits into the main message of the overall discussion.
- A presentation discussion is fueled by each panelist giving their presentation and then ending with 10 to 15 minutes for the audience to ask questions.

What type of panel discussion will be used?

STEP #2: KNOW YOUR AUDIENCE

Knowing your audience is a key piece to creating a successful panel discussion. Without knowing who your attendees will be, how can you determine what information or message points will be shared during the discussion?

Determine if your audience is one group of professionals, such as regulatory, industry, or academia. Or, is your audience a mixture of professionals? What level of knowledge will they be bringing to the panel discussion? How many attendees will be at your panel discussion?

PANEL DISCUSSION AUDIENCE

STEP #3: IDENTIFY TOPIC AND DEFINE CLEAR MESSAGE

Now that you have gotten to know your audience, it's time to identify the topic and be very clear about the message that will be shared with them during the panel discussion.

Identify the **topic** first, and make sure it is specific. For example, is the topic on the Food Safety Modernization Act, Food Safety, Controlling Listeria, etc. Remember to make sure the topic is attractive to the audience you got to know in step #1.

You may need to get more information on the topic by conducting research or holding interviews with people/groups/organizations specific to the topic that will be discussed during the panel discussion. Additional information gathered during this process can be influential in determining the message you wish to present and also helpful in determining the panelists for the discussion.

After identifying your topic, then clearly state the **message** you wish to present. For example, do you want to:

- convey an importance to industry
- seek support
- show the success of something
- bring awareness
- highlight something new
- encourage action
- disseminate facts
- show different points of view

1. What is the topic for your panel discussion?

2. Clearly state the message you wish to present during your panel discussion.

STEP #4: CHOOSE PANELISTS

Now that you have identified your audience, topic, and message for your panel discussion, it's time to choose the right panelists to bring it all to life. When choosing your panelists make sure they will bring a perspective and expertise that complements the topic and message you identified in step #2 and the anticipated audience you defined in step #1.

If you have been told who to have as a panelist and you don't know them, then contact the person and introduce yourself as the coordinator and moderator of the panel discussion. Take some time to get to know the person and their interest in the panel discussion topic.

Contact each panelist individually to discuss the topic and message of the panel discussion and the makeup of the anticipated audience. Also share with them how much time they will be given for their presentation and provide any additional support or encouragement for success. You will also need to get a biography from each of your panelists.

PANELIST NAME	CONTACT INFORMATION	BIOGRAPHY RECEIVED	PERSPECTIVE AND EXPERTISE

STEP #5: SCHEDULE AND HOLD PRACTICE SESSION

Once you have contacted all of your panelists and they have agreed to participate in the panel discussion, it's time to schedule and hold a practice session. It is recommended to schedule this practice session **at least a month** prior to the actual panel discussion. This will give you and the panelists time to make any tweaks prior to going live.

Here are some items we recommend you address during your practice session:

- First and foremost, make sure your panelists are aware of the time and date of the panel discussion.
 - Ask them to arrive or log in a ½ hour early. If the session is virtual, this will give everyone time to make sure their audio works, their background looks good on camera, etc.
 - A “tech check” may be scheduled two weeks in advance to practice logging in and using the virtual tools.
- Reiterate how much time each panelist will be given and what type of signal will be given by you (the moderator) when they are getting short on time.
- If you are holding a **presentation** panel discussion, have each panelist share their presentation with everyone to ensure no duplication of information. During this time also have panelists share any PowerPoint slides they would like to use. We highly encourage panelists to not share PowerPoint slides.
 - If a panelist insists on sharing PowerPoint slides during their presentation, ask them to send them to you for review. While reviewing the slides, make sure the number of slides is realistic for the amount of time they have been allotted for their presentation.
- Discuss and agree on the order of presentations. Each panelist will be offering a different perspective so ensure the overall information being presented flows smoothly. Have everyone agree on the final order of presentations.
- Discuss how people should dress for the panel discussion. This will ensure that no one is embarrassed by under or over dressing on panel discussion day.
- If your panel discussion is virtual, have a discussion on the type of virtual background that should be used or determine if the location each panelist is presenting from works with the goals of the discussion.
- If you are holding a **roundtable** panel discussion, make sure to review the questions you will be asking to your panelists.
- Discuss how question from the audience will be handled during the panel discussion.
 - Will the moderator solicit questions and then direct them to the most appropriate panelist to answer?

EXPERT TIP: After receiving an answer from the panelist you directed the question to, then ask the other panelists if they have anything else to add.

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DATE AND TIME OF PRACTICE SESSION	AGENDA ITEMS



COORDINATING A SUCCESSFUL PANEL DISCUSSION

Coordinating a panel discussion has its own set of obligations. Here is a list of items that will you're your attention while coordinating a successful panel discussion.

CONSULT WITH PROGRAM ORGANIZERS AND PRODUCERS

Have multiple conversations with the program organizers and producers of the conference/event where about logistics. Ask them:

- Who will be handling which parts of the panel discussion?
 - Virtual
 - What to do if one of the panelists can't get connected?
 - How early should everyone be on the call?
 - Does everyone have the correct link to the call?
 - How will questions be handled?
 - Will the attendees have a chat function to ask questions?
 - Can attendees raise their hand virtually and who will call upon them?
 - In-person
 - How early should everyone arrive?
 - Lighting?
 - How will questions be handled?
 - Will there be a microphone for attendees to use for asking questions?
 - Who will be in charge of the microphone to hand to attendees for asking questions or will it be on a stand in the middle of the room?

KEEPING PANELISTS INFORMED

Any time you receive information about the venue where the panel discussion is being held, forward it on to your panelists.

PANEL DISCUSSION PROMOTION

How are you going to get the word out about your panel discussion? Here are some suggestions.

- Write up a summary of the panel discussion to place in the agenda. Use key words and put important message points into the summary that grabs people's attention and makes them want to attend the discussion.
 - What publications can your panel discussion summary be put in?
- Encourage "word of mouth" advertising of the panel discussion. If you are on another committee, share with them that you will be hosting a panel discussion. Get your panelists sharing with their contacts too.

PANEL DISCUSSION SUMMARY



MODERATING A SUCCESSFUL PANEL DISCUSSION

As the moderator of a panel discussion, you are responsible for setting the tone of the panel discussion, keeping the panelist presentations on track, and ensuring there is time at the end of the discussion for attendees to ask the panelists questions.

INTRODUCTION

Keep your introduction brief. Script it out so you know what you are going to say and how long it is going to take. Remember, you don't want to take up too much time because you want your panelists to have the most time to share their information and you want to have at least 10 minutes available at the end for attendees to ask questions.

The panel discussion introduction can be broken down into three parts:

Part #1 of your introduction is to grab your audiences' attention. Hit them between the eyes with a one or two liner about the panel discussion topic. Grab their attention! Give the audience a what's in it for them to listen and be engaged. Also, add a bit of appropriate humor.

Part #2 is to introduce your panelists to the audience. While introducing each panelist, also say which person will go first, second, etc. Keep each panelist's biography short.

EXPERT TIP: One way to reduce the time on this portion is to refer the audience to the panelists biographies in the event program, if one is available or provide a link to each panelists LinkedIn account.

Part #3 is to give an overview of the panel discussion structure.

For a **roundtable** panel discussion, let the audience know that as the moderator you are going to start off asking questions to the panelists during the first half hour and then you will open up the last hour for them to start asking questions. The moderator should sit with the panelists during the discussion.

For a **presentation** panel discussion, let everyone know that there will be time available for them to ask questions at the end, but if there is no time left, they can:

- If the session is virtual, you could have the attendees send you (the moderator) their questions through email or "chat" to get answered by the panelists.
- If the session is in-person, you can let the attendees know the panelists will be available after the session to answer questions. (Give a location in the room where the panelists will be to answer the questions.)

PANEL DISCUSSION INTRODUCTION

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KEEPING PRESENTATIONS ON TIME

Be firm on time allotments for your panelist presentations! Here are some helpful suggestions to keep panelist presentations on time.

- During your practice session with your panelists, make sure to discuss the allotted time for each presentation and how important it is to stay within the allotted time.
- Develop a signal to let the panelists know when they are getting short on time.
- Prepare some “cutoff phrases” ahead of time. These can be helpful if one of your panelists becomes long-winded, starts rambling off-topic, or starts to dominate the discussion. Work with your panelists to develop some phrases. Example phrasing:
 - “You have an interesting point there, but we want to know more about ____.”
 - “Thank you, now let’s hear from ____.”

POCKETFUL OF QUESTIONS

What are you going to do if your audience doesn’t ask any questions?

Always have a pocketful of questions available to ask your panelists just in case your audience sounds like crickets when you ask for questions. This frequently happens in the virtual environment.

Have at least a couple questions per panelist and share them with your panelists ahead of time so they can be prepared.

BE READY FOR ANTHING

Part of a moderator’s role is to be prepared to tackle anything unexpected that happens during the panel discussion.

Think of anything and everything that could go wrong during or before the panel discussion and have backup plans. For example, what are you going to do if three out of your four panelists aren’t able to connect to the live session. How are you going to fill the time? One idea is to have notes specific to each panelists perspective prepared ahead of time that you can share in case something happens to one or more of your panelists.

What if an irate person stands up and starts arguing with one of your panelists? How will you handle the situation? One idea is to hear them out and then ask them to meet with you after the panel discussion to talk about their concerns further.

Bottom line... be ready for anything! Have a backup plan in place.

BACKUP PLANS

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WRAPPING THINGS UP

Make it a priority to have a couple minutes free at the end of the panel discussion to thank your panelists and leave the audience with a final statement relevant to the topic that was discussed. This is also the perfect time to encourage the audience to fill out an evaluation on the panel discussion.

You will also want to let your audience know if you will be sending out an email after the session with a link to the recorded PowerPoint presentation and any resources relevant to the discussion. (Make sure to ask your panelists if it is okay with them for the video of the session to be released.)

Also, send an email to each of your panelists letting them know how successful the session was and how grateful you were to have them be a part of it. Everyone appreciates being appreciated. Include a summary of the positive feedback you received from the attendees as well.

HOW DID IT GO?

Celebrate the success of moderating a successful panel discussion.

A good practice after completing a panel discussion is to reflect on the panel discussion process and outcomes.

Take notes so you can reference them prior to starting your next panel discussion project.

Ask yourself:

1. What went well?

2. What would I do differently next time?

**When you do a great job as moderator by bringing out the best in the panelists,
the audience will appreciate you.**