

## Tips for Facilitating Panel Discussions

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### Advance Preparation:

- Meet with the sponsor to confirm:
  - Expectations for the facilitator, the panelists and the audience
  - Details of the event (when, where, how long, who selects the panelists, who looks after facility arrangements, etc.)
- Speak to the panelists. Confirm their participation and the details of the event including instructions when and where to meet just prior to the discussion. Find out their positions on the topic. As a group, plan the discussion:
  - Set the audience objectives.
  - Allocate time for:
    - Introductions
    - Individual panelist presentations
    - Panel discussion
    - Audience Q&A (at least 25% of total time – this ensures adequate time for audience participation)
    - Thank Yous and Wrap up
  - Determine order for individual panelist presentations.
  - Establish the ground rules (for panelists and audience).
- Arrange/confirm logistics:
  - Who will be responsible for the ordering, setting up and running the media equipment? (Microphones, recording of the session, computer projector, screens, etc.)
  - Who will look after the lighting, heating/cooling, water/coffee?
  - How many people are expected in the audience?
    - Arrange the audience chairs so that people to sit in the front row. This narrows the divide between the panel and the audience and promotes audience involvement.
    - Arrange to have extra chairs at the back of the room if you need them.
  - How will the stage be set up?
    - Don't crowd the stage with unnecessary furniture, decorations, plants, etc. Make sure everyone in the audience will be able to see all the panelists.
    - Make sure there is enough light on the panelists so the audience can see their faces clearly.
    - Don't hide your panelists behind long draped tables. The audience appreciates seeing them out front and not behind a barrier. This also allows them to observe subtle body language and other non-verbal behavior of the panelists.

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- Arrange the chairs in a slight semi-circle, so panelists can clearly see one another. Provide small tables between them to set their drinks and materials.
- Plan to sit with the panelists (preferably in the middle) so that you guide the conversation. This is better than standing at a podium apart from them.
- Contact the panelists again once you know what equipment will be available and let them know what they should bring – samples, flipcharts, laptops, a few slides, etc.
- Dry run the session with the panelists using PowerPoint slides and agreed upon format, to determine flow and timing. There are two possible formats: (1) Facilitator uses slides with a predetermined framework, i.e., Qualification/Discovery/Solution Definition and Proof, with questions to be asked under each heading; or (2): Panelists use slides with presentation points and facilitator leads discussion based on those presentation points.

### The Day of the Panel Discussion

- Arrive early to check all the logistics.
- Meet with the panelists as previously arranged.
- Welcome them and go over how the discussion will be conducted. Address any last minute issues.

### Getting Started:

- Make your opening remarks:
  - Introduce yourself as the facilitator.
  - State the purpose of the discussion topic and the benefits for the audience. This will increase their attention. “We expect to have a lively discussion today on how scorecards support our business intelligence strategy. This will help you....”  
“Our four panelists tonight represent... or have differing views on... Once you hear both sides you will be able to decide how to proceed with...”
- Review and visually show the objectives of the discussion.
- Review and visually show the session format and/or outline, flow and timing.
- Tell the audience the ground rules for the discussion “There will be a 15-minute question and answer period after the panel discussion. Please reflect on what you hear, jot down your questions and ask them later during the Q&A period.”
- Introduce the panelists giving their name, titles in their organizations and relevance to topic being discussed. If the discussion is to be driven by the facilitator—using framework with questions to the panelists—introduce all panelists at the same time. If the discussion involves individual presentations, then introduce the first panelist. After his/her presentation, introduce the next panelist, and so on. Always use the panelists’ names when asking a question, getting clarification and summarizing key points.

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### Traps:

- Panelists are not prepared
- Set-up is not as requested
- Trouble with AV equipment
- Vague objectives
- Audience does not want to be there

### Keeping Moving:

- Focus discussion on purpose and desired outcomes:
  - Determine if the discussion is off target:
    - Is the discussion drifting off?
    - Are we losing focus of this agenda topic?
    - Is the discussion focusing on a trivial point?
  - Redirect the discussion by:
    - Clarifying: “Sally, you think the major reason was lack of IT support, is that accurate?”
    - Summarizing: “It seems we have pinpointed two key needs in our Discovery Process.”
    - Checking the process: “We’re supposed to be discussing issues in the Qualification phase but we’re now talking about Discovery issues.”
- Watch the time carefully and try to maintain a balanced pace throughout. Let panelist know when their time is running out. Alternatively a time keeper can do this. Pick up the pace or slow down the pace as necessary. Make sure you leave enough time for audience questions.
- Summarize or reach conclusions as you go. Summaries should be made after:
  - A major topic or item has been discussed
  - All relevant information has been presented
  - All sides of an issue have been expressed

**Note:** It is sometimes appropriate to check for understanding with the panelists and even with the audience before moving on, to be sure that everyone understands these conclusions.

### Traps

- Not monitoring time closely enough
- Getting caught up in the content and forgetting the process
- Allowing diversions from the topic
- Letting short discussion points evolve into lengthy discussions
- Rushing through a topic
- Moving on without conclusion or closure on a topic

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### Generating Final Conclusions and Moving to Q&A

- Make a few high level conclusions from the panel discussion: “Although not all panelists agree on the same next steps, they all agree that we can’t leave things as they are...”
- Thank the panelists and show your appreciation by applauding with the audience.
- Set up the Q&A. Explain the process. “Please stand, identify yourself, and be brief as possible so we can get to everyone’s questions.” If questioner is rambling on, be prepared to jump in and paraphrase or ask politely “What is your question?”
- Have a couple questions ready in case no one comes forward with a first question. Alternatively, you can arrange ahead of time with someone in the audience to ask your first question.
- Let the audience know when you are running out of time: “We should have time for two more questions...”
- Summarize the main themes of the Q&A: “Several people are interesting in finding out more about...” “It sounds like user fees and tax increases where the items generating most of the questions.
- Acknowledge the progress and thank all the participants: “This has been a very valuable discussion. We have (review the objectives). Panelists, you have given us some great tips and techniques... Audience, thank you for your questions and for your thoughts on... Please help me thank our panelists again.” (Applause)
- Transition out telling the audience what is happening next, i.e., a break, small group sessions, etc.

### Traps

- Not leaving enough time for Q&A. This sends the message that the audience is there to be passive listeners rather than active participants. Allow at least 15 minutes for Q&A for an hour-long panel discussion.
- Letting one or more vocal audience members take over.

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### Panel Discussion Checklist

- **Sequence:**
  - Well organized  Logical order
- **Transitions:**
  - Positive (i.e., “Excellent” “Thank you”)  Smooth flow to next topic/question
- **Questions asked:**
  - More open than closed
- **Questions handled:**
  - Effectively  Completely
- **Interaction:**
  - Promoted  Clarified  Paraphrased  Confirmed
- **Tone:**
  - Conversational  Natural
- **Language:**
  - Correct grammar  Correct pronunciation  Suitable level
- **Speech/Voice:**
  - Fluent  Well-modulated  Well-paced  Clear  Appropriate volume
- **Confidence and credibility:**
  - Interested in panelists  Interested in audience  Enthusiastic  At ease
- **Body language:**
  - Welcoming gestures and communication  Good eye contact
- **Visuals:**
  - Variety  Readable  Colorful  Simple  Support content  Effective use
  - Correct spelling  Correct grammar