



Make every communication count.

# HOW TO FACILITATE **GREAT PANEL DISCUSSIONS**

**A well-facilitated panel discussion looks like a proverbial stroll in the park to the casual observer.**

**In reality, a great panel discussion's success is usually the result of two factors: a great deal of pre-event preparation by the panel's facilitator, coupled with the facilitator's skillful decisions and smooth steering actions during the panel discussion itself.**

**Extensive preparation comes alive during the panel discussion through the facilitator's keen listening, close in-the-moment observation of audience and panel reactions, insightful on-the-spot decision making, and skillfully subtle maneuvering of the panel's attention as the discussion unfolds.**

This whitepaper is written for our clients who need to facilitate a panel discussion in a high-stakes situation—a situation where achieving a successful outcome has important ramifications for the audience, for the panelists, and/or for the facilitator.

The presentation and conversation skills that you have learned from Mandel to become a masterful communicator are all highly relevant to a panel discussion environment. In addition, when leading panel discussions, special preparation and interaction skills also are needed.

“Facilitating” an important panel discussion brings with it extra dimensions of communications complexity. This paper is intended to help you understand that complexity and plan a path through it to achieve a highly successful communications outcome.

The guidelines that follow are experience proven, and each can add meaningfully to a panel's overall success. Implement as many of them as possible in your situation.

The guidelines are also flexible. When necessary, you can modify some of these recommendations to fit the specific audience situation, the unique circumstances surrounding your panel's topic, the panelists' familiarity with each other, with you, or with the audience, and/or your personal objectives.

When in doubt, err on the side of exceptionally thorough preparation and going the extra mile.

A panel discussion that slips off the tracks creates a hard recovery act for the facilitator (to say the very least). We hope this paper will help you stay in positive territory from the first word to the last comment in your discussion.

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# PREPARATION NEEDED BEFORE THE PANEL DISCUSSION

## At Least 10 to 30 Working Days Before the Panel Discussion

Your preparation will be the key to your success.

After the panelists have been chosen and confirmed, your detailed preparation for facilitating a panel discussion will typically need to start 10 to 30 working days prior to the event, depending on the complexity of the situation and people's availability.

1. Prepare a sequence of questions you would ask the panelists if you were required to carry the full burden of questioning during the entire panel discussion. You will need these questions even if audience members will be allowed to ask questions of the panelists.

(In some situations, the facilitator does, in fact, need to carry the entire questioning burden, e.g., on most radio and television panels, industry conference panels with exceptionally large audiences, etc.)

Even when you, as the facilitator, will be sharing the responsibility for questions with the audience, a well-thought-out list of questions prepared beforehand has several vital purposes:

- It is a way for you to carefully think through what will be most important to the audience, what each panelist has to offer, and what will be the best order in which to cover those matters.

This thorough mental preparation will help you as you facilitate the panel discussion “in the moment” to be sure that the discussion gets around to those hot items that, for some reason, may not come up naturally by way of the audience or the panelists.

- It will give you the background you need to delve more deeply into important subjects when they arise during the discussion (because you have already thought carefully about them).
- It will give you the mental horsepower to “link” from one panelist's comments to another relevant question.
- It will give you confidence that, if things start to slow down in terms of audience questions or panelist interactions, you can energize the discussion again with your own set of well-thought-out questions.

Questions can be derived from experience with previous panel

discussions on similar subjects, audience surveys, discussions with subject matter experts, the ideas of others interested in the panel's subject, web research, and/or your own experience and objectives.

Once you have your list, test your questions with others who can give you feedback and enrich your ideas.

Organize your list into major themes (usually three to five themes maximum).

Arrange the themes in a logical order.

With this high level of content preparation, you can rely on this list of themes, and the questions related to each theme, as your roadmap for guiding the discussion along a logical path.

2. Send all appropriate documents to the panelists, including discussion themes and sample questions, the names and bios of other panelists, audience participant lists (if available), logistical information, event agendas, etc.

Sample questions and the discussion themes are particularly important to help the panelists focus their preparation, thoughts, stories, and opinions.

3. Meet face to face (when possible) or talk by phone with each panel member (after the panelists have received the documents referenced in item 2 above).

Make your interactions with panelists a dialogue (a conversation) as much as possible. The tone you set in these early interactions often sets the tone for the panel discussion itself.

- Introduce yourself and explain that you will be facilitating the panel discussion.
- Thank the panel member for his or her willingness to participate on the panel.
- Recognize the panelist's contribution and express your appreciation for the time and effort he or she will invest in preparing for and participating in the panel discussion (even if panelists are being paid).
- Provide a bit of information about your background (particularly why this panel's subject interests you).
- Explain the major themes and topics planned for the panel discussion to be sure that you and the panel member are on the same wavelength.
- Outline the importance of this panel discussion's themes and topics and the benefits for the audience.
- Identify the other panel members and share a bit of information about their backgrounds.
- Discuss the size of the audience and its composition (roles, titles, responsibilities, nationalities, language fluency, experience levels, previous experience with this subject

matter, interest levels in these topics, opportunities, challenges, etc.).

- Emphasize the unique value that the panel member you are speaking with will bring to the panel and the audience, e.g., knowledge, experience, unique perspective, etc.
- Recap (again) the benefits that this panel experience will provide for the audience.
- Highlight the benefits that participation on the panel can bring to this panelist. For example, what might he or she learn? Whom might this panelist have the opportunity to meet? What other benefits or professional contacts might result?
- Ask often and at various points in the conversation whether the person has any questions.
  - Answer questions that are appropriate to answer at that moment.
  - Assure the panelist that you will cover the other questions at logical points later in the discussion.
  - Make a list of the unanswered questions.
  - Refer to your notes during the conversation to be sure all the questions are ultimately answered.

- Discuss the sample questions that you have sent to the panelist.

Some points to cover include: Why are such questions important? Are there questions that the panelist is particularly interested in commenting on during the panel discussion? Are there questions that the panelist can't or doesn't want to address? Does the panelist have other questions to suggest?

If you want this panel member (or some or all of the panel members) to be prepared to answer specific questions, this is the time to discuss that and to specify which question(s) and why.

At the least, you will probably want to have one or more panelists prepared to address your kick-off question just to get things rolling at the start of the discussion.

- Discuss the way you will facilitate the panel discussion. Be sure to cover areas such as:
  - The elements of your role
  - Ways that questions from the audience will be handled
  - Interactions among the panelists
  - Time management for the discussion

(Also see “Actions Needed During the Panel Discussion.”)

- Discuss the logistics for the panel discussion.

Cover items such as times, location, room characteristics, panel seating arrangements, audience seating arrangements, dress code, any security or building pass issues that need to

be handled, travel to and from the meeting place, lodging accommodations, etc.

- Define any additional paperwork or background materials that you will be sending the panelist and be clear about what she or he needs to do with those items.
- Refer to your notes to be sure all earlier questions have been answered. If not, address them now.
- Solicit any further questions. Answer as appropriate.
- Express your sincere appreciation to the panelist for participating in this planning conversation and in the panel discussion itself.
- Provide your contact information and urge the panelist to contact you with any questions that might arise between now and the panel discussion date.

## The Night Before (or the Dawn Before) the Panel Discussion

1. Inspect the room to be sure it is ready (or can easily be made ready in time if some other event is scheduled for the room between your inspection and the panel event).
2. Be sure all the electronics work.
3. Test the acoustics to be sure you and the panelists can be heard. (You may need to ask some panel members to speak more loudly because of the room's acoustics.)
4. Be sure all handout materials are available.
5. Be sure directional signage is in place, if needed.
6. Have a pleasant introductory dinner (or breakfast) with the panelists, if possible, to establish rapport among them and with you. (This "getting-to-know-you" time often pays off handsomely in terms of panelists' interactions with each other during the actual panel event.)

## One to Two Hours Before the Panel Discussion

1. Re-inspect the room (see B above). Murphy's Law never sleeps.
2. Bring the panelists together (in the panel discussion room, if possible) for a last-minute briefing of facilitation and logistical details.
3. Answer any last-minute questions.
4. Express your enthusiasm and your confidence in the success of the panel.

## ACTIONS NEEDED DURING THE

# PANEL DISCUSSION

## At the Beginning of the Panel Discussion

1. Mingle a bit with the early audience arrivals.  
Don't isolate yourself: Strike up some short, small-talk conversations with some of the early arrivals; get yourself and the audience members connected; get yourself in their game; warm the place up.
2. Start on time. (Plan for help ahead of time, if needed, to make this happen.)
3. Kick off the session with a smile and the appropriate enthusiasm.
4. Warmly welcome the audience.
5. Introduce yourself and express why you are so pleased to be facilitating this discussion.

6. Introduce the themes and topics for the panel discussion and point out why they are of such great value to the audience.
7. Enthusiastically introduce the panel members and thank them for contributing their time and effort to make this panel possible.

8. Distribute the sample questions to the audience, if that is your plan, to get everyone's head in the game. (You may want to place these lists on the audience members' tables or chairs beforehand.)

Let those attending know that they do not need to ask these exact questions and that the lists are provided just to "prime the pump" and get everyone on the same wavelength.

9. Explain to the audience how you will facilitate the panel discussion.

Here is an example of one leader's explanation to the audience of the form of panel discussion he would be facilitating:

"I will be asking the panel some questions along the way to get the discussion going and keep it moving.

"You in the audience, however, are responsible for your own learning. Having these panel members devoted entirely to **your** knowledge and skill development for an hour is a once-in-a-lifetime opportunity.

"Therefore, this isn't designed like a television show that you can passively watch. Your personal role is to (1) listen intently and (2) ask questions that will help you uncover the learning and wisdom you need in order to be more professionally and personally successful.

"I'll keep things moving along on a logical track and manage the time. You need to do the detective work!"



10. Explain the time constraints.

At this time, also be sure to explain the fact that you may need to cut off some discussions at various points in the panel discussion to be sure that everyone has time to get through the major topics that need to be covered. Apologize in advance for this “necessity” and ask for everyone’s “forgiveness” beforehand. This gives you the right to do what you need to do to keep things moving along without appearing rude “in the moment.”

11. Kick off the panel discussion with your planned first question.

## While the Panel Discussion Is Underway

Here is where your preparation enables you to deliver that well-facilitated panel discussion that looks like a stroll in the park. Now, during the discussion, with the benefits of *intense* in-the-moment concentration, careful listening, observation of reactions, quick decision making, and skillful interactions with the panel members and the audience, you will be able to guide the discussion as it unfolds to a successful outcome.

1. Have your first question planned. Make it a question of importance and general interest – one that will get everyone’s attention focused on the discussion. It should not be too controversial a subject, however, at this early point.

You could ask your first question of the panel in general and hope someone grabs it.

A safer bet is to discuss the question with one or more panel members beforehand and ask one or more of them to be prepared to kick off the panel discussion with their answers.

2. It is wise to get every panel member to say something within the first few minutes. If everyone has not contributed a few words within a reasonable period of time, direct a question to any who haven’t yet spoken or, after one panelist has finished a comment, say something like, “Sally, I’d like to hear your thoughts on that.”
3. Use “signals” from the panelists to identify good targets for your questions. Watch the panelists’ eyes and body language when another person is speaking. People regularly signal (consciously or unconsciously) when they have something to add to the discussion as well as when they have little to add or little interest in the current issue.  
Use these cues to move smoothly from panelist to panelist as you explore a subject.
4. Use open-ended questions almost exclusively when you want to solicit the fullest expression of the panelists’ experience and ideas.

Rather than asking, “Do you agree with that statement?” ask, “In what ways do you agree or disagree with that statement?”

5. Mix the way you target the questions that you ask the panel.

At times, specifically ask a particular panelist to answer a question from you or the audience: “Keith, would you comment on that, please?”

At other times, direct an open question to the entire panel: “Okay, who’s willing to take that one on?”

6. Encourage many perspectives on the same subject.

Remember that one person is usually not the fount of all wisdom, and neither is one person’s answer to a given question the only good one. If Panelist A thinks “Red!” is the right answer, for example, ask other panelists to add their opinions.

You also will have learned things from your preparatory conversations with the panelists that will allow you to expand the discussion with a reference such as, “Robert, I know from our earlier conversations that you had experience in Europe with that exact problem. Please share that with the entire group.”

Your observation of eyes and body language often will tell you who has a different opinion or something more to add.

You can also direct an open question to the entire panel, such as, “Who has something to add to that?”

7. Be careful not to put a panelist in an uncomfortable spot if you can avoid it. You need to maintain your own concentration so that you don’t ask a panelist a question he or she may be unable to comment on intelligently or would feel uncomfortable answering. (This is another reason why your preparatory conversations with panelists are so important.)

Here again, watch for the clues that people’s eyes and body language give you.

8. Encourage questions from the audience regularly.

- Sometimes people will raise their hands. That makes your job easy at times, but usually you have to do some facilitating.
- Watch the eyes and body language of audience members just as you do those of the panelists. You’ll see expressions of curiosity, bewilderment, interest, comprehension, or “light bulbs” that you can use to appropriately ask a person in the audience if she or he would like to comment or ask a question:

“Craig, you were smiling pretty broadly when George was answering that question. What’s your reaction to that idea?”

“Susan, I saw your hand almost go up there. What’s your question?”

- At other times, ask an open-ended question of the entire audience, such as, “That sure is a hot issue. Who has a question to help us dig into that somemore?”

- If things start to slow down, remember – you are prepared. Ask one of the hot questions that you prepared ahead of time for just such an occasion.

9. Not often, but enough times to make it worth planning for, a facilitator is challenged by an audience member who wants to take far more air time than is appropriate.

These time-absorbing audience members come in two common varieties:

**The Incessant Question Asker** attempts to ask question after question, even when others are trying to get some air time. Every time there is the slightest opening, these questioners' hands seem to fly up like the hands of contestants on a timed-response TV quiz show, or these people just blurt out their questions without being called on by the facilitator.

**The Proclaimer** makes statements (sometimes long statements) at every opportunity, rather than asking a real question.

Both types seem to have similar personal agendas: to get noticed and/or to prove how much they know as opposed to keeping the audience's attention on what the panelists have to offer.

Since their behavior runs counter to the objective of a productive panel discussion and they can be a severe irritation to other audience members, the facilitator has to be prepared to deal with such awkward moments.

Also, the audience expects the facilitator to deal with disruptive audience members, but no one wants to be made uncomfortable by the way that is done. This is a touchy situation for the facilitator.

The best approach is never to lose your cool and to politely but firmly let these audience members know that you will need to limit their air time. For example:

To an Incessant Question Asker: "Bill, I know you have many questions on this subject, but I need to let others get their questions in as well." Then, **immediately** break eye contact and recognize another audience member who has a question, or ask the panel a question yourself. Do not get into a discussion with the incessant question asker.

To the Proclaimer: "I'm sorry, but for the sake of time, please state your question so we can have the panelists respond to it."

Or you might say:

"That's a lot of background information. Let me frame a question for the panel from what you have said. Panel, give us your opinions about..."

10. Use your list of three to five themes to keep the discussion flowing along a logical path.

Of course, there will be sidetracks along the way, but remember the path and return to it.

It is wise to remind the audience (and the panelists) where the discussion has been, where you are now in the discussion, and where you are going. It's easy for people to get lost and confused when a great deal of interaction is occurring. Your list of themes helps here.

7. Lastly – but perhaps as important as any of the above – have some fun.

Yes, you have to keep track of about ten spinning plates to keep all of this from crashing down, but that's part of the game.

Don't hesitate to take the opportunity to have a good laugh regularly with the audience, with the panelists, and/or at yourself.

## At the End of the Panel Discussion

End the panel discussion on a solid note. Don't let it just drift off.

1. Let the audience know that this will be the last question (whether from you or from an audience member).

“Our time is almost over, but I have one last question that I believe will be of interest to just about everyone in the audience.” (Then, ask your question of one panel member or ask each panelist to respond, depending on the nature of your question and the time remaining.)

Or say to the audience:

“We have time for just one more question. Who wants to get one last chance to gain more wisdom from this terrific panel?”

2. Depending on how the panel discussion has flowed, you may choose to conclude the discussion with the last question, or you may want to wrap up by asking each panelist to make short summarizing remarks.

“This has been an information-packed hour. I know our audience would appreciate hearing from each of you what you believe should be their most important take-aways from this discussion. Take about a minute each, please. Marylou, would you mind going first?”

3. When the discussion has been concluded, remind the audience of the themes and topics that launched the panel discussion.

4. Remind audience members why these themes and topics are so important for them.

If you want to summarize some of the key ideas, suggestions, and/or learning points that surfaced during the discussion, this is a good time to do that. Keep your summary brief, audience-centric, and to the point.

5. Sincerely thank each of the panelists by name. (If appropriate and allowed, it is often a nice touch to have a small gift for each panelist.)

6. Express to the audience your pleasure at having had the opportunity to facilitate this (highly valuable? profoundly informative? provocative?) panel discussion.
7. Thank the audience members for their participation.
8. Connect this panel discussion with the audience's next activity, if appropriate.
9. Conclude the session and direct the audience to the next activity or scheduled break.
10. Before the panelists leave the room, thank them again as a group and also individually for their time and for the value they provided.

Give yourself some personal congratulations. You have provided a valuable service for the panelists and for the audience.

## SUGGESTED FOLLOW-UP AFTER THE EVENT

After the event, some closing issues remain.

### Thank-You Notes

In this rushed world, most people greatly appreciate being remembered a short while *after* they have made a contribution to others.

A day or two after the event, it is a very professional touch to send a special communication of thanks to the panelists. Handwritten notes are usually especially appreciated because people so rarely take the time to write them these days. If an email is all you have time to do, at least do that.

### Feedback Distribution

If feedback from the audience was collected after the panel discussion, send it to the panelists, along with any explanation needed, if you feel it would be appreciated or be of valuable to the panelists. Send this separately from your thank-you note.

### Feedback for Yourself

Beyond any insights you may have gotten personally from feedback collected generally after the event, request feedback for yourself.

“  
It's our organization's way of being sure that, without being limited by time or location, you have access to all the key people and resources you will need in order to have a truly outstanding briefing experience with us.

”

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Ask people whose opinions you respect to give you their impressions of what they observed. What went well and what could you have improved in the way you facilitated the panel discussion? Consider their comments and incorporate suggestions that will help you be a better facilitator next time and a better communicator in all circumstances.

## Document Any “Lessons Learned”

If you think you may need to facilitate another panel discussion, or if others in your organization may need to do so, document the lessons you have learned from this preparation and facilitation process. Keep those notes (and this Whitepaper) available for future reference.

Please call Mandel Communications if we can help.

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