

Organizing Professional Panel Discussions

Panel discussions are popular for some great reasons. Panels allow you to feature diverse perspectives on a single topic. Panels also enable you to draw a number of experts to your event which may

help you attract a good-sized crowd, expand your professional network, and offer your audience on-trend advice and news.

Keep in mind, however, if your event features many panels, you also run the risk of boring your attendees with the monotony of listening, with little chance to interact.

To ensure a smooth event, and rich educational experience for your audience, take the steps outlined in this guide.

1. Determine the topic and scope.

The first step in creating your panel is figuring out what it will be about as specifically as possible. For example, if you choose the topic career development, narrow the scope by industry, sector, role, issue area, or audience i.e., Careers in Green Building, or Entry Level Jobs that Pay Well, or Careers for History Majors. Defining the scope will help you select panelists, think of questions to ask, and market the panel discussion to potential audience members.

2. Set a target audience size.

Decide how many people you'll need to accommodate and attract.

3. Nail down event details.

If it's a standalone event, secure a venue — and choose a time that will work for your audience.

Reserve the space at least a half hour prior and a half hour after for setup and cleanup.

Make sure the venue has the audiovisual equipment you need (microphones, support for recording equipment, etc.) and the seating capacity for the crowd you are hoping for.

Indicate setup needs (access to wifi, number of chairs, panel table, podium for moderator, microphones, pitchers of water, etc.).

Record the address, building name, room name & number.

Keep the name, phone number, and email address of the person who takes your reservation.

If the panel is part of a larger event, make sure you know the start time of the panel, the building name, address, room name & number so that you can let panelists know when you invite them.

4. Begin to market your event

If your panel is a standalone event, and you are responsible for marketing, this is the time to start spreading the word.

Use Eventbrite (a free event registration platform) to post a description and details.

Shrink the Eventbrite URL using bit.ly so you can track click thrus.



If the event is open to the public, promote the event online (your website, e-newsletter, relevant listservs, Twitter, Facebook, LinkedIn, CNRG, Mac's List, Craigslist, flyers in coffee shops, etc.) and on land using the bit.ly URL.

Enlist partner organizations or departments to spread the word about the event.

Monitor the registration numbers on Eventbrite to determine whether additional outreach is called for.

5. Brainstorm potential panelists.

A panel should have three to five panelists.

If the moderator plans to contribute to the conversation, keep the other panelists to four, max. Given the scope of your topic, think of people who have the experience or expertise to offer insights and stories that will be useful for the audience.

Even if you can only think of one potential panelist, reach out to invite them and then ask them who else would be appropriate.

If your panel is part of a conference, consider inviting panelists who already plan to attend the

conference, or people who live in the region of the conference venue.

Finally, the best panel discussions offer diverse perspectives, so make sure your brainstormed list are as balanced as possible in terms of the positionality of panelists (i.e., sex, race, age, etc.), geography, professional role, organization type, etc.

Importantly, don't send invitations yet — you have a few more things to do, so keep reading!

6. Organize panelist invitations.

Create a spreadsheet with potential panelist names, titles, organization names, email addresses, phone numbers (office and mobile), and invitation status (sent, accepted, declined, no response, etc.). Mobile numbers will be handy to have on the day of the event.

7. Decide on and invite a panel moderator.

Ideally the moderator will bridge the gap between panelists and audience. Options may include:

- Yourself!
- A host or sponsor (if applicable — a host or sponsor will appreciate face time with the audience),
- An organizational partner (for an AmeriCorps event, consider an AmeriCorps Alum with relevant life experience or education, for example).

When inviting the moderator, include the basic logistical information, a panel and audience description, and the reason you have chosen to ask them for this special honor. See step 10 below for more information.

The moderator may have suggestions for questions to include, as well as ideas about potential panelists to invite.

If you have special moderator instructions, send them to the moderator as an email attachment (PDF) after they've agreed to participate. Moderator instructions might include tips for keeping on schedule, and a description of moderator responsibilities.

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8. Brainstorm questions.

Given the scope of your topic, create a list of questions to ask, starting with brief self-introductions of panelists.

Write a few more questions than you think you'll need. Make sure to ask broader defining-type questions at the beginning (e.g., "what exactly does the term 'green careers' refer to?"). After that, list questions in order of priority. That way if you run out of time, you'll have covered the most important questions.

9. Assign times to each question, including introductions.

This list of times and questions will serve as your agenda.

Budget time for panelists to spend two or three minutes each on their responses. If you have five panelists, you could dwell on a single question for over 10 minutes.

If you have a 60-minute panel, that would add up to introductions, three or four good questions, and about 10 minutes for Q & A at the end.

Alternatively, to shake things up, you could use the last 15 or 20 minutes splitting the room into small group discussions, each panelist leading a

small group, and audience members choosing which panelist's group to join.

Save time and get through more questions by encouraging panelists to chime in only when they have a new perspective to contribute.

At the very end of the panel discussion, plan to have someone (either yourself, the moderator, or someone else), summarize the most striking points that arose during of the discussion.

10. Email panelist invitations.

Write each invitee *individually* unless they are closely affiliated (i.e., same organization, married, etc.).

In general, avoid cold calling panelist invitees. Try always to get people you know to refer you to panelists, so when you email, you can say, "our mutual friend Jane encouraged me to reach out to you."

When you email the invitation, include the following:

- Greeting, with the name of your mutual contact if necessary
- Invitation to speak
- Brief description of the panel...scope, rationale
- Name, title, and affiliation of the moderator
- Briefly, your reason for inviting *them* (what makes them a perfect fit for the topic?)
- Where (building name, floor number, room name & number, address)
- When (day, date, start and end times)
- Agenda with suggested arrival time, and the list of questions (these will help the invitee know if they really are a good fit, and if not, maybe who else you should invite)
- Audience details — who, how many
- Deadline for responding with a yes or no (i.e., "please let me know by May 5th at 5 p.m. If you are able to join the panel")
- Event registration details, if applicable (especially important if panelists must pay

registration fees to attend the event...they will need this information before they make a decision).

One reason to issue such a thorough invitation is to make sure the panelists know what they are in for, should they say yes.

Another reason for a thorough invitation is so they'll see the logistical information several

At the end of the panel, have someone summarize the key points that arose during the discussion.

times, increasing the likelihood they'll be able to access it when it comes time to show up!

11. Acknowledge each invitation response individually.

Each time an invited panelist responds, thank them and update your spreadsheet (see step #6).

If they've agreed to speak on the panel, let them know you'll send more information soon.

Request photo, bio, or anything else you need from them. If you're creating a handout, for example, ask them for resources they'd recommend on the topic.

Also ask them if you can include their contact information on the handout in case audience members have questions later on.

Finally, if the panel is part of a larger event and registration is required, share instructions, links to register, etc.

When an invitation is declined, feel free to ask the person if they happen to know someone else who'd be appropriate.

If you don't get at least three panelists, go back to brainstorming and inviting more people.

12. Confirm event details with speakers.

Once you've confirmed three to five panelists, email them all together, along with the moderator.

In this group email, include the same logistical information you included in the initial invitation (agenda with questions, event time and venue, panel and audience descriptions, etc. — see step 10).

Additionally, include the name of each panelist and the moderator with their title and organization name. Do this both to introduce the speakers to each other, as well as to ask them to correct any errors.

List any tips for preparing, such as thinking of specific anecdotes or stories to tell to illustrate their insights.

Remind them about anything (photo, bio, etc.) you need from them, as well as event registration deadlines, if applicable.

13. Create the handout (optional).

Include tips, resources, and panelist contact info (with permission).

14. Keep on promoting.

If applicable, continue promoting the event, now *naming* the panelists.

Add the names and affiliations of the panelists & moderator to outreach materials (Eventbrite page, Facebook event page, etc.).

Connect with panelists and moderator on Twitter and thank them publicly for speaking at the panel, and link to the event's [bit.ly](#) URL.

Ask panelists to spread the word to their networks.

15. Confirm room setup with venue staff.

Discuss items such as number of chairs, panel table, podium for moderator, microphones, pitchers of water, etc.

16. Prepare print materials.

- Create and photocopy the audience **handout**.
- Make enough copies of the **agenda with questions** for each speaker.
- If you have **moderator instructions**, update them to include the agenda with questions, panelist names, photos, and bios. Print a copy to give the moderator at the panel.
- Create **name tents** for the panelists and moderator (keep the font as large as possible so audience members at the back of the room can see them).
- If you plan to record the discussion, print **release forms** for people to sign, or at least create a large sign to display that says "by being in this space, you're giving us permission for record your image."

17. Send reminder notes.

Send reminder emails to registered audience members and (separately) to panelists & moderator a few days before the event, repeating the key logistical info. Include directions, public transportation details, and parking instructions.

In emails to panelists and moderator, emphasize the suggested arrival time (at least 15 minutes prior to the panel start time).

18. Purchase amenities for the speakers.

Buy a "token of appreciation" for each panelist and moderator. Potted baby plants, pins or mugs with the host's or sponsor's logo, relevant books, boxes of tea, nice chocolate bars, etc.

Other amenities to consider:

- bottles of water (if water pitchers aren't available)
- hard candy to distribute on the panel table, in case someone gets a cough, and
- pads and pens, for panelists and moderator to jot thoughts during the discussion.

19. Prepare on the day of the event.

- Day of, arrive at the venue early.
- Ensure the room is properly arranged, test microphones, etc.
- If you plan to record the discussion, test the recording equipment.
- Distribute **agendas**, **water bottles** and **gifts** on the table for each panelist and moderator.
- Place **moderator instructions** on the podium.
- Place **handouts** for the audience on a table or chair near the entrance, or place one handout on each chair.
- Post the **sign** that gives you permission to record, or else distribute **release forms**.
- Greet moderator, panelists, and audience members as they enter.

20. Get started!

At the panel discussion start time, if appropriate, say a few words to introduce the moderator, request that audience members ask generalized questions during the Q&A portion, so that all may benefit from the responses, and then turn the floor over.

21. Take notes and photos.

During the panel discussion, make note of one or two comments or actions of each panelist and the moderator. Use these observations to personalize your thank-you notes. "I especially liked your point about..."

Also, note whether any questions are confusing, need to be rewritten, or need to be omitted next time.

Further Reading

Adult Learning Methods: A Guide for Effective Instruction, 3rd Edition by Michael W. Galbraith

The Trainer's Handbook, Updated Edition by Karen Lawson

Also note any great questions you hear from audience members, or any interesting improvised or follow-up questions from the moderator.

If you organize a panel on the same topic again, you'll appreciate your revisions from this time around.

Snap photos to post to your organization's Facebook page, Twitter feed, blog, website, e-newsletter, etc. Use the photos from this year's event to promote next year's.

22. Thank everyone for coming at the end.

23. Follow up.

Hand-write thank-you notes and send them to the business addresses of the moderator and panelists. Business addresses are typically easier to find online than home addresses.