



Summit Moderator Guide

MODERATION STYLE

We recommend that you listen to an episode of "The Intelligence" podcast by *The Economist*. We believe that its succinct moderating style is optimal for our summit format of short pithy panels.

www.economist.com/intelligence-podcast

NOTES TO PANELISTS

- If there is a handheld **mic**, tell your panelist to *hold their mic to their chin* when they speak.
- Vendor panelists should **not be advertorial** and only discuss products in the context of case studies and insights.
- The spirit of the panel: Encourage panelists to be controversial and jump into conversation if they have a strong point to make. Remind them that we cannot address all aspects of the topic in 20 - 30 mins so focus on key takeaways for the audience. *The audience will actively retain 5% of the content (if we are lucky.)*
- You can also share this moderator guide with the panelists so that they understand your approach to moderating.

PANEL PREP

Selecting Questions and Panel Thesis

Ask your panelists to *email to you the questions* that they want to answer. *(In the Intelligence podcast all moderator questions were sent initially by the interviewee.)*

Panelists will be more passionate and knowledgeable answering these questions.

It is still important to turn these questions into a narrative - your job is to select the questions that drive a consistent thesis.

ON THE DAY

Introduce your panel

Do **not** allow the panelists to introduce themselves. We do not have enough time and their linkedin address is on the agenda.

An example approach: "I am Anne, a partner at Consulting Co. We have an amazing panel for you today that represents all aspects of this topic: Bob is head of risk at XYZ Fintech, Sally is CRO at Acme Bank, ..."

Remember, if you are excited about the panel and panelists, then the audience is likely to be excited.

State the Thesis

At the beginning of the panel state the thesis of the panel and what you intend to answer in the next X minutes.

How to ask questions

Never use round-robin style questioning. All questions should be targeted to the panelist.

Here are some examples of ways to move the conversation forward:

- "In our discussion yesterday you mentioned XYZ. I thought that was an interesting approach. Could you summarize that for us?"
- "Do you agree with Bob's thoughts on ABC?"
- "There seems to be an elephant in the room that we are all avoiding ..."
- "To be clear, are you saying that ..."

If a panelist goes rogue, talking for too long, politely interrupt with:

"That is very interesting, Jim. Could you hold that thought. Sally, what is your take on this?"

Active Listening

Pay attention to panelists' responses.

Writing down notes is good theater. Prompt follow-up questions based on what panelists say to delve deeper into their ideas.

Manage Time and Flow

Keep the discussion on track by allocating time for each question and ensuring that panelists stay within the time limits for their responses. Do not be shy to interrupt your panelist with clarifying questions. Transition smoothly between questions to maintain the flow of the conversation.

Summarize and Conclude

There is no Q&A time so encourage attendees to find your panelists at the break or set up one-on-ones through the Summit network app.

Watch the countdown clock and start to conclude 5 minutes before the end of the panel. Summarize the key points made during the discussion and highlight any consensus or divergent opinions.

Again, be excited about the panel's ideas: if you are excited, then the audience is likely to be excited and remember the session.

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