The Complete Guide to Moderating a Successful Roundtable

Adapted from research and best practices by Geoff Evans and Robin-Yann Storm

Understanding the Roundtable Format

A roundtable is fundamentally different from other conference formats:

- Not a panel: Panels have multiple speakers talking to each other on stage
- Not a talk: Talks feature prepared slides and one-way communication
- True roundtable: One moderator facilitates while audience members contribute equally
- Purpose: Community building, answering specific questions, and creating a safe environment for sharing and learning

The defining characteristic is that anyone who attends can raise their hand and contribute to the conversation, creating a democratic learning environment where the audience drives the discussion.

Initial Setup and Introduction

Moderator Introduction

- Briefly explain who you are and your relevant experience (2 sentences maximum)
- Establish credibility without dominating the session
- Mention any relevant online communities related to the topic

Setting Clear Expectations

- "If you want to talk, raise your hand. If I point at you or call your name, you talk."
- "If you haven't been pointed at or called out, you do not talk."
- Explain that you'll mentally track the order of raised hands
- Clarify that you may use hand signals to acknowledge people
- Tell participants they can look around the room while speaking
- Let attendees know they can leave without hurting your feelings if the session isn't valuable to them

Participation Guidelines

- Ask participants to state their name and company when first speaking
    - This provides context for their comments (company size affects perspective)
- Explain that you'll use hand gestures to indicate when someone should speak up
- Clarify that you'll spend approximately 5-10 minutes per topic
- Mention that you may cut off topics to ensure broad coverage

- Encourage continued discussions after the session ends
- Explain that you may prioritize new voices over those who have already spoken

The "Iron Fist, Velvet Glove" Approach

This essential moderation philosophy combines:

The Velvet Glove

- Be incredibly kind to the audience
- Create excitement about the topic
- Maintain a jovial, happy demeanor
- Make everyone feel welcome and valued
- Use diplomatic language when redirecting

The Iron Fist

- Maintain absolute control over who speaks when
- Immediately address anyone who speaks out of turn
- Stop side conversations and whispering promptly
- Cut off rambling speakers when necessary
- Enforce the hand-raising system consistently

This balance is crucial - the moderator must be both the most welcoming person in the room and the most controlling person. Without this balance, roundtables quickly devolve into chaos.

Starting the Conversation

Demographic Questions

Begin with quick questions that get everyone participating physically:

- "What roles are in the room?" (list common roles and ask for hands)
- "What tools do you use?" (list common tools and ask for hands)
- Always ask "Any I didn't mention?" to be inclusive

Icebreaker Questions

Use prepared questions written down beforehand:

1. "What is the best thing that happened in [Topic] for you this year?"
2. "What is the worst thing that happened in [Topic] for you this year?"

After 3-4 responses to each question, briefly summarize what was shared. This reinforces key points and demonstrates your understanding of the topic.

Topic Collection

- Ask "Who has a question they want to ask the room?"
- Write questions on a whiteboard or paper (aim for 3 questions per 30 minutes)
- Adjust unclear questions: "Do you mean like...?" or "So your question is...?"
- Prioritize questions most relevant to the roundtable topic

Managing the Discussion Flow

Maintaining High-Quality Conversation

- Lower latency between speakers: Minimize dead air by identifying the next speaker while the current one is finishing
- Scan constantly: Look around the room for raised hands while listening to the current speaker
- Move around: Change your position to ensure all participants can be seen and heard
- Make eye contact: Acknowledge participants with nods or hand signals
- Track multiple elements simultaneously:
    - Listen to the active speaker for relevance and clarity
    - Think about who will speak next
    - Consider when to switch topics
    - Watch for new hands being raised

Handling Specific Challenges

- Rambling speakers: Interject with "And so what you mean is...?" to help them focus
- Side conversations: Address immediately as they disrupt nearby listeners
- Speaking out of turn: Politely redirect to the hand-raising system
- Quiet speakers: Use hand gestures to indicate they should speak up
- Dominant voices: Actively seek out new participants who haven't spoken
- Unanswered questions: Offer to discuss after the session if no one can answer

Topic Management

- Before moving to a new topic, ask the original question-asker: "Did your question get answered?"
- Summarize key points from the discussion before transitioning
- If a topic isn't generating responses, rephrase or generalize it
- If time is running short, prioritize questions that will benefit the most participants

Closing the Panel

- Summarize key points from the discussion
- Thank the participants
- Provide information about any follow-up resources or events
- Remind participants to fill out the survey at the end of the session

Post-Roundtable Engagement

To ensure the conversation continues and the community remains engaged after the roundtable, consider implementing the following strategies:

- **Encourage Continued Discussions**
  - Recommend participants continue conversations outside the session (for example, in one of the designated Wrap-Up Areas), fostering informal networking opportunities.
- **Facilitate Contact Sharing**
  - Provide a space or system for participants to drop off business cards to be added to a mailing list.
  - This helps build a network for future collaboration and communication.
- **Promote Online Communities**
  - Direct participants to join relevant Discord or Slack groups, if available, to maintain ongoing discussions.
  - Highlight any existing online communities related to the roundtable topic.

These methods help create a sense of community and ensure participants can stay connected, share insights, and collaborate beyond the session.

Technical Considerations

Microphone Etiquette

- Microphones can act as a "totem," clearly indicating who the current speaker is.
- In quieter rooms, microphones may not be necessary, but when used, they help maintain order and focus.
- Be mindful that passing microphones can slow down the flow of discussion.
- Consider the room dynamics and audience size when deciding whether to use microphones.

Physical Positioning

- Stand throughout the session (never sit behind a laptop)
- Focus primarily on non-speaking participants to find the next speaker
- Move to different parts of the room to create new sight lines
- Position yourself where you can see everyone

Common Pitfalls to Avoid

Format Mistakes

- Multiple moderators: This turns the roundtable into a panel (exception: accessibility needs)

- Introduction rounds: These waste time and create uneven participation
- Letting the moderator participate too much: If you want to contribute, clearly signal your role change
- Failing to define scope: Without clear boundaries, discussions wander off-topic
- Not summarizing: Without periodic summaries, key points are forgotten

Participation Problems

- Allowing side conversations: These quickly escalate and make hearing difficult
- Not controlling interruptions: Each interruption encourages more disruption
- Focusing too much on the current speaker: This prevents you from managing the next steps
- Letting a single viewpoint dominate: This discourages diverse perspectives
- Not checking if questions were answered: This leaves participants unsatisfied

Additional Recommendations

Dedicated Note-Taker

- Assign a dedicated note-taker to document key points and discussions. This frees up the moderator to focus on managing the session.
- Notes can be used for preparation in subsequent years and for comparing trends across sessions.

Becoming a Skilled Moderator

Moderating effectively requires:

- Deep subject matter expertise to understand and summarize complex points
- Ability to multitask (listening, scanning, planning simultaneously)
- Confidence to control the room firmly but kindly
- Energy to stand, move, and remain engaged throughout
- Adaptability to adjust to different audience sizes and dynamics

The moderator is singularly responsible for the success or failure of a roundtable. With practice, you'll develop an intuitive sense for "vibing out what the conversation needs" - when to let a discussion continue, when to redirect, and how to maintain the perfect balance of control and openness.

A well-moderated roundtable creates unique value that no other conference format can match. When participants leave having both contributed and learned, with new connections and specific answers to their questions, you've succeeded in creating not just a session but a community experience that will keep them coming back year after year.