Panelist Engagement Follow-Up Questions

1) **How do we include fun holiday panels when workload for employee panelists and panel schedule load are big concerns and make it not a waste of time and resources?** Holiday events do not need to be large, expensive or time-consuming to be effective. The key is to integrate them into existing panel activities rather than adding another obligation to already busy schedules. For example, instead of scheduling a separate one-hour holiday celebration, consider incorporating a 30 or 60-minute holiday-themed activity into an existing panel session.

   To ensure these activities are not viewed as a waste of time or resources, connect them to a meaningful objective. Ask yourself: Does this activity help panelists feel valued, strengthen team connections, provide learning opportunities, improve communication or reinforce the importance of their role? If the answer is yes, it is contributing to panel engagement.

   It is also important to recognize that engagement initiatives do not have to occur for every holiday. A few well-planned, high-impact activities each year are often more effective than frequent events that create scheduling burden. **Gathering panelist feedback can help determine which activities they find most meaningful and whether they believe the effort is worth the time invested.** Ultimately, the goal is not to create more work. The goal is to create moments of connection, appreciation, and recognition within the time you already have available.

2) **Can you elaborate on how you measured engagement and give tips on how we can check engagement in our own panels (in a measurable way)?**
   We utilize the Engagement Questionnaire, a validated, 10-item questionnaire that assesses the three factors contributing to engagement including Active Involvement (Focus), Purposeful Intent (Personal Relevance), and Affective Value (Focus). In the tool kit, we have included links to the papers that describe the development and use of the Engagement Questionnaire.

   For teams looking to measure engagement within their own panels, we recommend using the Engagement Questionnaire alongside behavioral metrics that can be tracked over time. For example, time spent completing a task or answering a question can provide a useful indicator of engagement. Our data suggest that as panelists become less engaged, the time they spend evaluating a product or responding to a question tends to decrease.

Other measurable indicators may include response completeness, participation consistency, and response quality. Tracking these metrics over time can help identify changes in engagement.

3) **We have the support of management, but they still do not participate in panels. How do we get upper management to participate so their team can lead by example?**
When leaders make time to participate, they demonstrate that panel work is business-critical, not just an optional activity. I would encourage you to have an open conversation with your leadership team to identify opportunities for them to join panel sessions and make sensory participation a recurring calendar commitment, similar to other important business-critical meetings.

   To make participation easier, consider offering brief "drop-in" opportunities that require only 10-15 minutes. You can also encourage leaders to participate more regularly by highlighting their involvement in company communications. Sharing photos and stories of leaders attending panel sessions can reinforce the importance of sensory work and visibly demonstrate leadership's commitment to the program.

4) **How to mitigate bias in employee panels when the panelist pool includes many co-workers familiar with batches (and situations) being tested?**
You may not be able to eliminate familiarity, but you can design your studies so that panelists rely on what they perceive rather than what they know. The goal is not to remove knowledge, but to prevent it from influencing the data. The sensory team can do this by:

   a) Diversifying panel participation when possible - If certain employees are directly involved with the products or situations being evaluated, consider including panelists from other departments or locations who may have less familiarity with the samples.

   b) Reinforcing sensory objectivity - Regularly remind panelists that their role is to evaluate what they perceive, not what they think should happen based on prior knowledge.

   c) Incorporating deliberately modified samples to assess sensory objectivity - When appropriate, include a sample with a subtle, intentional change (e.g., a difference in flavor intensity, sweetness, or texture) to evaluate whether panelists can detect and accurately describe sensory differences without relying on prior knowledge or expectations. Samples should be presented under appropriately blinded conditions, with the modification and expected difference unknown to panelists.

5) **You mentioned that monotonous questions can cause disengagement, but using familiar questions can help engagement. Can you please elaborate on the difference?**
Monotony in the questions reflects the fact that we often ask very similar questions to our panelists. For instance, in a consumer panel, we may ask the participants to respond to questions on overall liking, flavor liking, sweetness liking, and aftertaste liking followed by Just-About-Right questions on the same attributes. To a consumer, these questions are very similar, and they can feel redundant. The statement about familiar questions has more to do with question complexity. A returning panelist will have experience with the format of many questions and therefore, complexity is minimized. A new panelist will not be familiar with any of the questions, so keeping the test design and question structure simple is useful.

6) **Some panelists have started to use their phones more often while testing. Sometimes giving small reminders doesn't work. What would be other options?**
1) I would first try to understand why panelists are reaching for their phones. Are sessions too long? Are there excessive wait times between samples? Are panelists disengaged, distracted, or unclear about expectations?

It may be helpful to revisit panel expectation guidelines and explain that phone use during testing can affect focus, concentration and ultimately the quality of the sensory data being collected. If the behavior is limited to a few individuals, a private conversation may be more effective than repeated group reminders.

2) Another option is to notify panelists that, moving forward, cell phones should be placed in a designated basket before entering the sensory booths. The communication could read:

"We've noticed that cell phones can sometimes create distractions during evaluations. To help everyone stay focused and ensure we are collecting the most accurate sensory data possible, we ask that all panelists place their phones in the designated basket before entering the booths."

Communicating this expectation in advance may encourage panelists to leave their phones behind or avoid bringing them into the sensory testing area altogether, reducing potential distractions before testing begins.

7) **How do you give negative feedback (red light) without discouraging panelists?**
When providing negative feedback, focus the conversation on solutions and improvement opportunities rather than the issue itself. Discuss what can be done as a team and how the sensory team can support the panelist's success. This helps reinforce that they are not expected to solve the challenge alone and that resources, coaching, and support are available to help them improve.

8) **What kind of program or software did you use for gamification?**
We have used Gorilla software which provides some programming options to customize the test design. Other commercial software enables activation of certain gaming elements including a progress bar and feedback. Compusense has these features available, but I am sure other packages do as well.

9) **How to improve trained panel morale for repetitive product testing when multi-day testing is required?**
One of the most effective ways to maintain morale during repetitive, multi-day product testing is to help panelists understand the purpose and impact of their work. When panelists know how their feedback will be used and why the study is important, they may feel more invested in the process and more motivated to remain engaged throughout the study.

Finding small ways to break up the routine can also make a difference. When the study design allows, consider incorporating brief team-building activities, providing refreshments, or planning a small treat to look forward to at the end of testing. For example, bringing in donuts or another snack on the final day can serve as a simple gesture of appreciation for panelists' time and commitment. Recognizing their contributions, sharing progress updates when appropriate, and checking in with panelists during longer studies can also help them feel valued.

Finally, ask panelists for feedback about their experience. They can often identify which aspects of testing are most repetitive, tiring, or challenging and suggest practical ways to improve the experience. Where possible, use their feedback to make adjustments that support morale and reduce fatigue without compromising the study design, testing conditions, or data quality.

10) **Can you share more about what metrics you use for your quarterly performance reviews?**
We conduct quarterly panelist performance reviews using a green, yellow, and red rating system to provide a consistent framework for evaluating performance, identifying areas for improvement, and recognizing strengths. Our reviews consider both professional behaviors and sensory performance to provide a well-rounded assessment of each panelist.

We evaluate panelists across the following areas:

A) Professionalism and teamwork

- **Teamwork:** Works collaboratively and respectfully with other panelists.
- **Flexibility and adaptability:** Adjusts to changes in testing schedules, study requirements, and procedures as needed.
- **Relationship with the panel leader:** Communicates effectively, follows instructions, and responds constructively to feedback.

- **Punctuality and attendance:** Arrives on time and attends scheduled sessions consistently.
- **Engagement:** Demonstrates focus, attentiveness, and active participation throughout sessions.

B) Sensory calibration

We assess panelists' performance on established sensory calibration exercises, including their ability to correctly identify and evaluate basic taste reference solutions. These exercises help us monitor sensory awareness and consistency over time and identify when additional practice or recalibration may be beneficial.

C) Project-specific sensory performance

When the study design and data allow, we use statistical analyses to evaluate panelist performance across three key measures:

- **Discrimination:** Can the panelist detect expected differences between samples when differences are present?
- **Agreement:** How closely do the panelist's evaluations align with the rest of the panel's results?
- **Repeatability:** How consistently does the panelist evaluate the same sample across repeated assessments?

These measures provide objective insight into sensory performance and help identify patterns that may warrant further training or investigation.

How we use the ratings: For our panelist's scorecard, the green, yellow, and red system helps us summarize overall performance and determine where support may be needed. Green indicates performance that meets or exceeds expectations, yellow highlights areas for monitoring or improvement, and red identifies areas requiring more focused attention or corrective action. The goal is not simply to rate panelists, but to provide constructive feedback, guide targeted training, and maintain a reliable, engaged, and well-calibrated sensory panel.

11) **Some panelists stay longer during testing to gain more money. They are contractors, so we can't modify their payrolls. What can I do?**

If panelists are extending testing sessions to increase paid time, I would first review the testing process to identify any opportunities to improve efficiency and reduce unnecessary downtime. It may also be helpful to establish clear expectations regarding participation, testing pace, and session duration so that all panelists understand what is expected.

If the behavior appears limited to a few individuals, consider having a private conversation to understand the underlying cause and reinforce the importance of completing evaluations efficiently while maintaining data quality. The goal is not to rush panelists, but to ensure that testing time is being used appropriately and consistently across the panel.

12) **How are you defining exceptional results for your high performing team? Do you feel one component of panelist performance is more important?**
We define exceptional panel performance through three key measures: discrimination, agreement, and repeatability. Together, these metrics help us determine whether panelists can detect meaningful sensory differences, evaluate attributes in a way that aligns with the rest of the panel, and deliver consistent results across repeated assessments.

While all three measures are important, their relative importance depends on the objective of the study. For example, discrimination is particularly important when determining whether a product change has resulted in a perceptible difference, while agreement and repeatability help ensure that results are aligned and reliable. Ultimately, exceptional performance means producing data that are both statistically sound and meaningful for the study's objectives.

Beyond these technical measures, we consider the value the panel delivers to product development and business decision-making to be an important indicator of success. When product developers can use sensory findings to understand consumer-relevant product differences, make informed formulation decisions, or identify opportunities for improvement, the panel is demonstrating its broader impact.

Ultimately, we do not view any single performance metric as the most important in every situation. A high-performing panel balances discrimination, agreement, and repeatability while consistently delivering actionable insights that support product development and business goals.

13) **What does the 1:1 engagement entail? For instance, is greeting and thanking individuals 1:1 enough to make a difference?**
Greeting individuals, thanking them for their time, and indicating how their participation is contributing to a specific outcome provides meaning and lets panelists know their data is important. In our studies, 1:1 engagement means an investigator sits down with a panelist and administers the test. In some cases, the investigator records the panelist's responses and in other cases, the panelist will record their own responses (the test design and questions asked should dictate this). I believe 1:1 testing is useful, because it maintains a social connection between the panelist and investigator, and motivates participants to be more focused. It is hard to "goof off" when the boss is in the room!

14) **We have employees who refuse to be involved in panels, but not due to any dietary restrictions. Any suggestions for making testing more mandatory?**

I would start by understanding why employees are reluctant to participate. In some cases, the barrier may not be the testing itself, but competing workload demands, inconvenient scheduling, a lack of understanding of the panel's purpose, or a perception that participation is not valued. If sensory panel participation is an expected part of an employee's role, I would recommend partnering with HR and leadership to establish clear expectations and ensure they are communicated and reinforced consistently. This may include incorporating panel participation into job responsibilities, setting expectations for attendance, and ensuring employees have adequate time to participate during their workday.

Leadership support is also important. When managers communicate the value of the sensory program, help prioritize participation, and recognize employees' contributions, it reinforces that panel testing is a meaningful part of the business rather than an optional additional task.

Ultimately, the goal is to foster a culture in which panel participation is understood as a shared responsibility. Employees are more likely to engage when they understand how their feedback informs product decisions, have the time and resources to participate, and feel that their contributions are valued. If participation is mandatory, expectations should be clearly established with HR & leadership and applied consistently, while continuing to provide an opportunity for employees to raise legitimate concerns or barriers.

15) **How do we recognize high performers in front of the panel without it appearing like favoritism?**

The key is to ensure that recognition is based on transparent, objective criteria rather than personal preference. Clearly communicate what is being recognized, whether that is attendance, repeatability, discrimination, calibration performance, improvement over time, teamwork or another measurable contribution.

I also recommend varying recognition opportunities so that the same individuals are not always being highlighted. For example, you might recognize categories such as most improved, consistent performer, team contributor, attendance, or mentoring others. This allows more panelists to be recognized for different strengths.

Most importantly, explain the criteria up front and apply them consistently. When panelists understand how recognition is earned, it is more likely to be viewed as appreciation rather than favoritism.

16) **What recommendations do you have for maintaining engagement of an employee panel that is currently incentivized but may no longer be due to budget cuts?**

Budget cuts can be challenging, particularly when panelists have become accustomed to receiving incentives. In these situations, consider increasing communication around the purpose and impact of the panel's work, sharing examples of how the data influences product decisions. Most importantly, be transparent about the change. Explain the reason for the budget cuts, acknowledge the impact it may have on panelists, and involve them in discussions about alternative ways to keep them engaged. Panelists are often more understanding when they feel informed, respected and included in the conversation.

17) **What are some tips for engaging at-home consumer panels?**

Many of the same strategies used to engage on-site consumer panels also apply to at-home panels. The key is to make participation meaningful, convenient, and engaging while minimizing the effort required. Clearly communicating the purpose of the study and how participants' feedback will be used can help them feel that their time and contributions are valued.

Several strategies can help improve engagement in at-home panels:

- **Keep surveys clear and intuitive.** Use straightforward questions, simple response scales, and a logical flow. Avoid unnecessary repetition and overly complex instructions.
- **Minimize participant burden.** Keep surveys and testing sessions manageable in length, limit unnecessary tasks, and consider the time required for sample preparation, evaluation, and survey completion.
- **Provide clear, step-by-step instructions.** Because researchers have less control over the at-home testing environment, instructions should clearly explain how to prepare, handle, and evaluate samples. Visual aids, photos, or short videos can help reduce confusion and improve protocol compliance.
- **Make participation engaging.** Where appropriate, incorporate light gamification, such as progress indicators, achievable milestones, or interactive elements, to make the experience more enjoyable without distracting from the evaluation.
- **Provide timely communication and support.** Send reminders, clarify expectations, and make it easy for participants to ask questions or report issues with samples or testing procedures.
- **Recognize and reward participation.** Appropriate incentives, thank-you messages, and occasional feedback about how participants' input contributes to product development can help maintain motivation, particularly in longer-term studies.
- **Monitor engagement and data quality.** Track completion rates, drop-off points, response times, and indicators of data quality, such as incomplete responses or inconsistent evaluations. These measures can help identify where participants may be experiencing difficulty or losing interest.

Ultimately, successful at-home panels balance participant engagement, ease of participation, and data quality. Since researchers cannot directly observe the testing environment, well-designed protocols, clear communication, and thoughtful monitoring are especially important. The goal is to make participation as convenient and rewarding as possible while ensuring that samples are evaluated consistently and the resulting data remain reliable.