This document will give you the key concepts and guidelines presented by Ken Molay in his web seminar on guidelines for webinar moderators and facilitators.
Our first problem in addressing this topic is defining the role we are talking about. A moderator may encompass different duties from one webinar to the next.

Sometimes the moderator is expected to be one of the presenters taking a lead role. He or she leads off the discussion and then introduces other speakers and coordinates the Q&A segment.

A moderator may be invited purely as a coordinating presence, to give introductions and do handoffs to the presenters, but not to add content value during the session. A panel of experts often uses a “pure” moderator just to manage timing and keep participation even and flowing.

The moderator may also be in charge of technical support and operation of the webinar. In this case, he or she has responsibilities both on the air and behind the scenes.

I will attempt to give tips covering all these roles, but you should be aware that not all tips apply in all cases. Many of the more technical production aspects can safely be ignored by moderators when another individual takes care of those items.
Depending on the circumstances of the webinar and who is involved, the moderator and event producer may share responsibilities for tasks such as are listed on this slide. They should have a clear understanding up front of who will take care of these details, as an incorrect assumption could mean that important duties fall through the cracks, creating problems later in the webinar.
I have broken my tips into three sections dealing with when the tasks need to be accomplished. We start with advance planning as part of the setup and organization of the web event.
As moderator, you should have a clear understanding of what the webinar is supposed to accomplish. What is the host company’s reason for holding the event? How will they measure the success of the webinar? You should be ready to help them achieve this goal in the way that you frame your interactions with the speakers and the audience.

You should be able to clearly state a specific action item you are driving audience members towards. It is also helpful to know how the company plans to follow up with attendees after the event so you can tell the audience to expect a phone call, email, survey, or other post-event communication or action.
The other side of the equation for goals and objectives is understanding the audience’s interests and expectations. Review invitations and promotional copy that attendees have seen. Make a list of “You will see” and “You will learn” items. Make sure you are ready to help lead presenters to highlight these promised deliverables.

Mentioning audience expectations in your introductory remarks is a good way to show empathy and understanding to your audience.
You may need to contact the speakers to coordinate rehearsals, clarify content points, or even to reconnect them if something goes wrong during the live event. For your introductions you need to know how they wish to be presented, with company and title along with preferred method of addressing them. Know whether they are Mr., Mrs., Ms., Dr. and what form of their name they like to use. Collect this information on a “cheat sheet” for use in communicating with them ahead of time and on the air.
Confirm that the presenter(s) on the webinar are familiar with the goals and know what they should be driving the audience to do, know, or believe. A good presenter will help you accomplish your objectives. And if you have a presenter who submits material that is off topic or poorly focused, you can reference this information when asking for revisions.
Put all communications in writing. Never rely on memory of telephone calls and vocal agreements. Have a planning document or email correspondence handy for reference by all parties. After planning calls, send an email summarizing what was agreed.

Solidify time commitments up front. Make sure that speakers know they need to be on the call/webinar a half hour before the scheduled start time of the event and make sure they know the pre-event time is a scheduled part of the session time that they are committing to. Also inform them that rehearsals will be a required part of their involvement. If you keep adding unexpected additional demands on their time as you go along, you will end up with a frustrated and uncooperative team.
Even if you are not a technical coordinator for your event, you should familiarize yourself with the basic web conferencing controls so you can be the “voice of support” on the line if a speaker runs into trouble.

Know how to advance slides and jump to a particular slide. Know how to display an audience poll and what steps audience members follow to submit their votes.

Know how to manage typed questions from the audience and answer them publicly or privately. Know how to conduct private conversations with speakers and the technical crew.

Know how to use annotation tools and how to erase overlaid drawings.

Your comfort level with the software lets you fill in if necessary, provide backup for the presenter, and give proper instructions to attendees.
Know how long you have for each part of your event. Work out a table of milestone timings for the introduction, speaker content, Q&A, wrap-up, etc. Share the timetable with all presenters so everyone knows exactly how things are supposed to run. This makes sure that you know whether you are on track during the event. If you have multiple speakers, put your most experienced and comfortable presenter last. That person can adjust the presentation if necessary to account for the prior speakers going short or long.
Suggest to your speakers that they look for an opportunity to bring the audience into the presentation as active participants by adding polls during their talk. Make sure to account for the time needed to wait for responses to come in and for discussion of the results. Your presenters should always have a point to make about poll results so the polls aren’t seen as meaningless time fillers.

Make sure to clarify whether a poll should allow a single answer or multiple selections (if supported by your conferencing software). Work out with your technical coordinator who will actually create the polls in the conference system.

Determine who will bring up the polls during the session, who will determine when there are enough votes to show results, and who will close the polls. These little details make for a smooth, well-oiled experience that impresses your audience.
When all the speakers’ slides have been submitted, get a copy of the complete presentation deck. Print it out in “Handouts” format with 6 slides per page.

Make notes on your printout where polls occur, where there is a change of speakers, where Q&A and wrap-up starts. These help you keep yourself ready for milestones where you might need to come in.

You should also jot slide numbers on your printout so you can quickly access a slide of interest during the presentation. This is often helpful when asking or answering a question that went with a particular slide.
This is a small detail that adds to the smooth running of an event. If you have multiple speakers, work out whether speaker 1 introduces speaker 2 or hands back to you as moderator to introduce the next speaker.

If you have three or more speakers, I recommend handing back to the moderator to make a formal introduction of each speaker before his or her section.

Be ready for a speaker to get it wrong and mistakenly hand off to the next speaker or to you. Adapt to the circumstances and jump in if necessary or let it flow if it sounds smooth.
This is an important part of your role as moderator. Know when you will introduce questions from the audience… Sprinkled throughout the speaker’s presentation? At the end of each speaker’s segment? At the end of the combined presentation? If you are saving up questions until the end, you might want to introduce one question while waiting for polling votes to come in.

Ask your presenters if there are any types of questions you should not ask. Make a list of “taboo” inquiries.

Have presenters submit a few “seed questions” that you can ask if things are slow during Q&A. Make sure to ask the presenters whether their questions are higher or lower priority than real audience questions… Sometimes presenters want to use a fake question as the way to introduce some additional content.
Rehearsing is one of the most important things you can do to ensure a quality webinar. It is also viewed as an inconvenience and a burden by most speakers, so you need to be enthusiastic and supportive of the rehearsal process.

A technical familiarization session makes sure that all parties are comfortable using the web conferencing software and know how the overall audio/technical components will work. You should conduct this or arrange for an appropriate technical representative to lead this session. Make your technical orientation as short and focused as possible. You don’t need to demonstrate every feature of the software. Try to keep your presenters focused on quality content and delivery rather than being experts in the software.

A group run-through lets everyone practice introductions and handoffs, as well as check for conflicts or redundancies between speakers. As you watch the presenters give their presentations, look for areas where you might be able to help them… For instance, you might be able to add annotations (with their permission) to help highlight key figures or points on a crowded slide.
Now it’s time to look at your responsibilities on event day before the public session goes live.
If you are an organizer/moderator, you need to have the audio and web portions of the conference active 3-5 minutes before you told your presenters to be on the pre-call. If you are a pure content moderator, be on the pre-call right at the scheduled time. You want to show your presenters you value their contribution by not making them wait on a dead line. They should feel their time is respected.
I actually announce the little reminders I do as a pre-flight checklist. This keeps it from sounding like you don’t respect the speakers’ intelligence and puts it back in the context of normal operating procedures that you always execute.

Make sure extraneous ambient noises are blocked out by shutting doors and turning off speaker systems. Mobile wi-fi devices such as Blackberries must be powered off… If the internet receiver is left on, it can cause audible interference on the line.

Make sure presenters have a hardcopy of their slides, have water handy, and have used the restroom.

Review how things will get started and the speaking order, as well as the handoff procedure between speakers. Finally, let them know if they should stay quietly on the line at the end of the session for a debrief subconference.
It is hard to have too many backup and failsafe processes in place! If practical, try to be logged on with two separate computers, each with presenter status. I try to use two audio lines as well. If possible, these should be on separate circuits. So you might use a VoIP computer mike and a telephone. Or a phone company telephone line and a computer telephone circuit.

Have a printout of the slides as your ultimate fallback. If your computer crashes, you can follow along on the printout and talk on the phone while you try to recover.
If you are using an operator-assisted audio conference line, write down the name of your operator. Confirm whether you will be taking questions over the phone. If so, tell your operator to wait until the Q&A session is announced before giving instructions on how to queue a question (they often like to give these instructions at the beginning of the call, which is too early for your needs).

Audio conference operators have a standard script that they use to introduce conference calls. In most cases, this is unnecessary since you will be introducing the webinar. You want to reduce the number of introductory voices and comments. You can always have them read their intro script and you can make changes as you deem fit. I usually ask the operator not to use their ending script at the end of the call either. I prefer to be in control of the first and last things that attendees hear.
It is very important to check audio lines for all speakers on your webinar. Have each person introduce himself and check for consistent volume levels. If you are using an operator-assisted conference call, your operator may be able to help adjust volumes. Use the phrase “Frank had a small pizza today” to check for puffing noises, hissing noises, or popping noises into the microphone.

Audio quality is one of the most frequent frustrations reported by attendees. Don’t shrug this off as “good enough.” Higher audio quality translates to better audience satisfaction.
Make sure each speaker knows and is comfortable with the way you plan to interact with them. If you will introduce them and quietly let them deliver a full presentation, say so. If you plan to do more give and take, with leading questions and your comments on their material, let them know that as well. A good speaker will have rehearsed her timing to fit within the allotted segment. Don't be the one who pushes them over their rehearsed time.
This is the time for you to double-check preferred forms of address and pronunciations. Write down the names of everyone on the call with you, no matter how well you know them. It’s amazing how your brain can suddenly freeze when you are dealing with several activities at once! It is a good idea to be consistent in your forms of address. If one speaker is “Dr. Smith” then all speakers should be addressed formally by last name. If everyone agrees to first names, then use that.
If your web conferencing software allows private communications with your speakers, remind them that the audience cannot see your messages. If you type “Speak Louder” or “Speed up” they should not comment on it to the audience. Just adjust and keep going.
I like opening a Word or Notepad document on my screen with some standard phrases that I know I might need in communicating to audience members. Then I can copy and paste a quick typed response to individual questions. Some of the most common phrases are along the following lines:

• Yes, we are recording the session and we will send you an access link by email after the webinar.

• You will be able to request a copy of the presentation slides on the survey form at the end of the session.

• You can download a copy of the speaker’s reference information by using the File Download button at the bottom of the screen.
A good moderator makes the audience and presenters feel comfortable and happy to be taking part.

While you need to do your reminders and checklist, make sure to keep your tone light, enthusiastic, and conversational. Encourage the speakers to chat with each other about trivial matters. Stage fright can be debilitating to some speakers, so you need to get them feeling like this is the same as a phone call between friends.

Similarly, you can start a conversation with early attendees before the session by asking them to type in their location or what the weather is like. They appreciate knowing that a real person is acknowledging their presence and their participation. It also helps encourage interactivity later in the webinar.
Finally we get to the role of the moderator during the session. If you have planned and prepped your speakers well, this should be the least stressful part of your job!
As you introduce the main session and give the audience tips on how to interact, keep the technical directions as short as possible. Your goal is to get out of the way and let a speaker start delivering promised value quickly. Your audience came to get information. Satisfy their expectations as fast as you can.
One of the ways moderators often delay getting to the information is by giving instructions ahead of time. For instance, “At certain points during the session today, you will see polls displayed on your screen. You can click your response and then click the submit button to lock it in.”

Why tell people this until there is a poll and they can do something with the instructions?

Similarly, don’t worry about instructions on how to ask questions over the phone until you are ready to take questions.
You will probably give at least a brief introduction to your speakers. If you have one or two speakers, it makes sense to introduce them up front. But with three or more, I prefer to introduce each person immediately before he or she starts to speak. It keeps the identity matched with the speaker better than rattling off a long list of names and companies at the beginning and expecting your audience to remember them all.
If you offer audio to your audience via streaming audio, make sure to monitor the audio stream rather than listening to your telephone conference. You want to hear playback problems or a lost streaming connection when your audience does. You should keep your phone handy, but muted when you are not speaking.
It is easy to sit back and let your attention drift while a presenter gives his or her segment. You need to stay focused and ready to jump in if necessary to deal with an audio problem, dead air, a lost connection, or other problem.

Keep yourself sharp with mental scenario tests: “Pop quiz, hotshot. The sound suddenly stops. What do you do?”
In any webinar with a large audience and streaming audio, someone will report problems getting clear sound. If you get a few reports of sound problems, it is almost certainly caused by problems on their side. A slow network connection, an overloaded computer, or a jammed wireless connection can create dropouts or buffering.

I usually have a stored help suggestion ready, such as “Please try closing other applications like email or web browsers that might be competing for resources.”

If you have telephone access to the conference call as a backup, have the phone number and access code ready to copy and paste.

In a worst case scenario, you may have to suggest that they listen to the recording later.

If the audio really gets dropped, you’ll know it. The entire audience will type messages and you should also hear the problem on your monitoring computer. You need to jump in quickly.

Paste the phrase into audience chat that I wrote on this slide. Interrupt your speaker on the phone and ask them to pause while you reconnect the streaming audio. Keep the audience informed of your efforts while you work on fixing the problem. Remember, they are hearing and seeing nothing, so you need to let them know that you are taking action.
If you run an open chat or an open phone line, there is always the potential to get inappropriate comments from an audience member. Remember… if your entire audience heard the problematic remark, they deserve to see that you are handling it. Start politely:

• Let’s keep comments appropriate for a public audience with respect for all our guests. Thank you!

• Let’s refrain from advertising our own products and services so that the webinar doesn’t turn into a Craigslist session! 😊

A second violation may require a private warning response from you such as “This is inappropriate for our meeting. Please do not continue in this vein or we will remove you from the session.”

As a last resort, know how to remove an attendee from the session and be prepared to do it. I have almost never needed to do this on a public business webinar. Most people will remain within your guidelines if you make it clear what the ground rules are.
Watch out for dead air while waiting for poll results to come in. When a poll is displayed, you might want to jump in and remind attendees that they will get an email following the webinar. Or that slides will be available. Or you can ask an audience question to the presenter (if you agreed on this in your planning). If the poll allows multiple selections, make sure the audience knows they can click more than one response.

You can also tell the audience that you are going to be quiet for a moment while they read through the choices and make their selection. The important thing is to avoid unexplained silence. As long as the audience knows why the sound is stopping, you can insert a 5-10 second quiet stretch.
There are times when you know as much about the subject as your presenter. It can be very frustrating when you have good examples and stories that illustrate their points or you want to make additional comments on something they have raised. Or you want to answer an audience question yourself.

But unless you have explicitly agreed beforehand on a collaborative presentation approach, you need to let them have the spotlight and the recognition as the subject matter expert. If we make an analogy to a comedic duo, your job is to play “the straight man.” It’s not as fun, but it’s a crucial role in making them look good.
How do you handle a presenter who is obviously running over their time slot or is taking too long during Q&A?

Hopefully you have prepared them to watch the private chat area so you can send them a quick message to watch their time. Keep those messages very short, since they are distracting and make the presenter lose his or her flow. I usually write in all caps: “WATCH YOUR TIME” or “SPEED UP”.

If a private message doesn’t do the trick, you may have to cut in. There are some phrases you can use to subtly cue the presenter to watch the time. Try this kind of phrasing:

• “Bob, I’m just going to cut in for a moment here to remind our audience that even though our time is getting limited, they should make sure to stick around for the Q&A session that will follow your formal presentation.”

• “Bob, we don’t have a lot of time left, but I wonder if you can give a quick answer to this question from Doris…”

• “Bob, it’s obvious you have a lot of information and opinions on this topic. I’m going to give you a chance to expand on this a little later, but first I’d like to see if Jane wants to jump in with her view on the question.”
Your management of the Q&A process should be guided by the advance planning you did with your speakers. You will know which types of questions to omit, you will know when to introduce questions, and you will have seed questions to use if needed.

When you read an attendee question, make sure to say the first name of the person who typed it. It puts a human face on the question. Make up a name if you ask a fake seed question.

If you see a question with an abbreviation you don’t understand or a term you don’t know how to pronounce, use private chat to ask your presentation team for help so you can present it properly.
You should have a scripted paragraph or two that helps you end the session on a strong note. Know exactly who you need to thank and don’t keep repeating your thank you’s (a common nervous habit). Remind the audience of any follow up they can expect.

Thank the audience for their time and participation and remind them of their action item. Make it clear that this ends the session and they can exit or hang up. This acts as an unambiguous cue to your audio operator (if used) that they should bring you back to the private subconference.
As part of your closing, make sure to reinforce a particular action item that audience members should take. “Answer the survey form” or “Complete the feedback form” or “Visit the website and check out the additional information available to you” or “Check your email for the follow up information we will be sending.”

You want to be very clear of your expectations for the audience and why taking the requested action will be of benefit to them.
I welcome any comments or questions you might have. Please feel free to email me or use the contact form on the Webinar Success web site.