

## Tips for Session Coordinators/Recruiters & Moderators

The moderator's objective is to be an integral part in the creation of a session that both meets the intention of the of the program committee and the expectations of the attendees.

To achieve this, session moderators work closely with the session coordinator to implement the program's committee's idea for the session. A good session will include a shared common vision between the session coordinator, moderator and presenter. One of the moderator's functions is to be a liaison between the program committee and the presenters.

### *Planning*

- Session Recruitment and Planning
  - **Know the planning timeline.** Know key due dates (for session descriptions, presenter presentations, etc.).
  - **Review and/or refine the session description.** Talk with the recruiter to ensure you understand the session's content and direction.
  - **Review and/or redefine the session approach** (open forum, buzz group, panel discussion, etc.). Make sure you understand the expectations for the session you will be moderating. Presenters may also have input in this.
  - **Fine-tune** the session description and learning outcomes within the allowed timeline.
  - **Choose presenters** who will live up to their commitment and deliver a good presentation. Give them flexibility to present what they wish within the parameters of the session.
- Working with Presenters to Prepare for the Session
  - **Schedule at least one conference call or web conference with the presenters.** Determine the order of the presentations and find any overlaps or gaps in the materials. Split the session time among the presenters, so everyone knows how long they'll be speaking. Schedule time at the end of the session for Q&A.
  - **Review the presentations and provide feedback to presenters.** Make sure presenters understand and conform to the allotted time and stick to the topic of the presentation. Review all presenters slides to assure they are clear and do not appear cluttered with too much information. Encourage presenters to check the SOA website for tips and advice.
  - **Get presentations in on time.** Make sure presenters are aware of the deadlines for submitting presentation materials. Encourage presenters to bring a copy of their presentation on a thumb drive in case there are technical problems on-site.
  - **Meet ahead of time.** Whenever possible, schedule time to meet with the presenters in person before your session to iron out any last-minute timing or presentation questions. It may be useful to share cell phone numbers in case of emergency.
- Working on Moderator Comments for the Session
  - **Prepare your opening and closing remarks.** Opening remarks should introduce the topic and share some current events and other subjects relevant to the presentations.

- **Prepare your own questions.** Prepare 2-3 questions of your own to insert into the conversation during the session.
- **Prepare biographical introductions for each presenter.** Ask the presenter ahead of time for key biographical items to use in your introduction of each presenter.

### *Presentation Day*

- Before the Presentation Begins
  - **Arrive early at the assigned presentation room.** Make sure you are comfortable with the laptop and A/V equipment, and that presentations have been loaded properly.
  - **Welcome presenters.** Show them the set-up.
  - **Welcome attendees as they enter the room.**
- Moderator's Opening Remarks
  - **Welcome the audience and thank them for joining this session.** Advise on the location of any handouts or other items for the audience.
  - **Introduce yourself.** Keep it brief – title/company and your particular interest/expertise in the session topic.
  - **Talk briefly about the session topic.** Relate why the topic is important for the audience and provide a quick road-map for the presentation to establish a logical flow from presenter to presenter.
  - **Introduce the presenters.** Use the information from the biographies you have prepared for each presenter (see under Planning above).
- Presentation Disclaimer
  - **Refer the audience to the presentation disclaimer published in the program.**
- Facilitating the Presentation
  - **Have questions ready for each presenter and jump in when appropriate.** Prepare 2 or 3 relevant questions for each presenter and speak up during the presentation if you have relevant, timely and practical experience to share with the audience. As a courtesy, review those questions with the presenters in advance.
  - **Assist attendees in participating.** If it's a large room, there may be microphones set up for questioners – make sure attendees know where those are. In smaller rooms, watch the audience during the presentation, and if you see someone with a quizzical expression, call on them.
  - **Manage questions and answers.** If an attendee has a very specific question for the presenter and engages in a conversation with little relevance for other attendees, invite the attendee and presenter to continue their conversation after the session. (The presenter may do this as well)
  - **Assist the presenter when needed.** If a presenter is stumped by a question from the audience, try to assist in the response to the question either yourself, or by opening the question to other presenters (or even the audience). You can also record the question and promise to follow up with an answer.



- **Watch the time.** Each presenter should be allotted a specific portion of time and you must keep track of time. Agree ahead of time with the presenters how you will signal that their time is out. Make sure sessions start and end on time, particularly for sessions that count toward continuing education credits.
- Moderator's Closing Remarks
  - **Provide a quick re-cap of the session.** What did we learn today? Where do we go from here? What was the key message from each presenter?
  - **Thank the audience for their attention.** Invite additional questions as follow-up to yourself and the presenters.
  - **Request audience to complete evaluation form.**
- After the Presentation Ends
  - **Thank the presenters for their time and efforts.** Ensure that the presenters do not leave behind materials or personal belongings (i.e., clean up the table).

### *Post-Meeting*

- Follow-up.
  - Thank the presenters (again).
  - Address any follow-up or unanswered questions or comments from attendees during the session.
  - Review evaluation form results.
  - Provide any personal feedback to presenters that you consider appropriate, if you haven't done so already.
  - Send a note to the meeting chair if you think the session should be repeated, and in what format; or if you think additional sessions on related topics would be well-received, describe the topics to start the list for next year.