

Telephone Conference Call Tips

Planning

Agenda

- Send announcement for agenda items at three weeks before call. Give participants opportunity to react to draft agenda at least a week before the call and invite them comment.
- Have an agenda that includes goals, participant expectations (action issue), timing and person who will represent.
- Don't overbook your agenda.
- If you expect active participation from all participants, consider the impact of volume of comments on time available when determining the number of agenda items. On a 10 person call with the expectation that everyone comments on each agenda item, and their comments range from 1-3 minutes (actually most will not comment), you can accommodate about 3 agenda items in an hour.
- Decide on roles. The meeting chair does not have to be the same person who is looking after the call facilitation duties.
- Limit the length of telephone calls to 2 hours (maybe with a stand up break in between).

Technical Set Up

- Send all participants the dial in number and pass-codes (if any) needed.
- If the call leader controls the start/stop of the call and may have to leave early, have a second person with leader privileges so the call does not get cut off.
- Arrange to get rid of call in tones (beeps) with numbers greater than 15.

Scheduling and Preparation

- Consider participant availability just as you would for any other meeting.
- Consider time zones when scheduling – put EST in your notices.
- Communicate local time or how to calculate local time when sending meeting announcement.
- Distribute supporting documents/files at least 2 weeks before the call start.
- Post the agenda on the website for interactive comment.
- Inform participants if they have to have a file or website open on their computer desktop.
- Distribute a list of all attendees with committee member contact information
- Have a conference call attendance list with name, email and phone number in case you need to contact an individual before, during or after the call.

Starting the Call

- As the facilitator, it is helpful to log on early and be the first online (5-15 minutes).
- Greet and know who is online and introduce those sitting around your table (if appropriate). Do a roll call. Notes should indicate who was and who was not on the call.
- Establish protocol of announcing name when taking a turn speaking
- Review and, if needed, adjust agenda.
- Find out if there are any individual time constraints ("I have to leave early") and adjust accordingly. This is particularly important if you need the input or participation of the person leaving early to achieve the goals of the call.

General Call Etiquette

Include this with all call meeting announcement (i.e., on second page of agenda):

- Call from a quiet location.
- Put all phones, but particularly cell phones on mute when not talking.
- If using speakerphones, use the mute button.
- Don't use the hold button if your phone system has built in background music or announcements.
- Avoid paper rustling or using a keyboard.
- Try to avoid multitasking - some is unavoidable, but we count on your participation.
- Announce name when speaking
- Speak clearly. Slow down if you are a "fast talker"
- Be supportive of other callers.

Attention & Engagement

- Have 5 minute bio breaks and "quick stretches" during calls greater than 1 hour in length.
- Use guest speakers or multiple speakers to avoid "boredom" with one voice/presenter
- Track who is talking so you can call on those who have not had a chance/chosen to speak up.
- Use people's names to get their attention.
- If the group gets off the agenda, refocus but take note of the side issue for later attention.
- Break up long stretches of one speaker
- When appropriate, go "around to circle" for inclusive participation
- Listen for folks who may be more comfortable talking (avoid dominance) or very quiet.

- Consider "break out sessions" where pairs get off the main call, call each other, interact and call back on to the phone bridge.
- For decision-making processes, restate or repeat key issues as they are honed down to a decision point.
- If your participants can be online at the same time they are on the phone, consider web-based collaboration tools to create shared electronic notes, flip charts, etc. Sometimes allowing "side chats" or "chat breakouts" can increase participant engagement.
- Generally, the larger the group, the more directive your facilitation needs to be to keep a small number of people from dominating the call.
- During the call, stop and ask for feedback.
- If you don't want to ask each person to respond to a general query ("do you understand the new procedure?"), ask questions such that silence means assent. There is a drawback to this technique in that sometimes silences does not truly mean assent and understanding can be lost.
- Share leadership duties to help less engaged people become more involved in the call. Ask individuals to "lead" sections of the agenda.
- Assign people different roles - note taker, timekeeper, "keeper" of unanswered questions, etc.
- "Side" Conversations - If someone wants to comment directly to a previous speaker, they can use that person's name to focus their attention. "Sarah, that's a good suggestion"

Interactive Techniques

- Brainstorming - ask participants to note down other's contributions to a brainstorm. After the brainstorming period is done, ask people to comment on the words people chose to express their ideas. Help the group look for convergence and divergence around the creative process.
- Telephone Break Out Techniques - Pair up participants in advance and share a phone list. During the call, assign a pairs task, have the pairs get off the main call and work for 10 minutes and return to the main number at a stated time to report out/debrief the activity.
- Member Reference Maps - For widely distributed groups that meet regularly; create a map with pictures of the participants near their location on the map. Distribute to the group or publish on a web page.
- Take meeting notes and use for follow up. Distribute as soon as possible after the meeting and highlight follow up steps and responsibilities. Have action items in bold and italics so that members can easily spot next steps.
- Recap meeting or next steps as appropriate
- Offer opportunity for final/closing comments
- End the call promptly, particularly with phone bridges with timed access

Evaluation/Feedback

- "Just Three Words" Phone call evaluation: Do a round of comments from everyone on the call with the constraint that they can only use three words in their response. For example, at the end of the call you might say "what three words describe your experience of today's call (each can be an independent thought, rather than a phrase)?" The notes from these exercises can then be later reviewed and observed for similarities, differences and patterns. You might only want to do this for the first few calls as a gauge for process. Also, invite participants to send any comments directly to you.
- Use some form of feedback or evaluation tool to help improve subsequent calls. A simple "after action review" (what did we intend to do, what did we do, what would we do differently) can be done at the conclusion of a call, or could be done with forms or email post-call.
- "Just Three Words" - ask each person for three words that describe their experience on the call.