

# Telephone Conference Call meeting help

## Planning the Meeting

1. Create an agenda that includes topics, goals or action desired, and timing. Itemize the specific results expected from this meeting ("approve the budget, pass a motion to..., etc.") The chairman of the meeting should have a clear understanding of the results needed.
2. Plan the meeting based on the fact that teleconferences may run more slowly than in-person meetings. A good meeting facilitator solicits participation from all participants. Think it through: if you have six participants, and each participant speaks once on each topic for about 3 minutes, you will have a discussion of 18 minutes, plus closure (making motions and voting) which means you will consider agenda items at the rate of two-three per hour.
3. Use a timed agenda. Timed agendas are a great aid to a meeting chairman to keep a meeting on track, and also give the participants an idea of the comparative significance of each item.
4. Identify functions. In a conference call meeting situation you may wish to have a meeting chair plus a technology manager who coordinates visuals and troubleshoots technical problems. Make sure the participants understand the job descriptions and responsibilities of each person. There should also be a designated secretary, who may record the call for accuracy of the meeting history. If calls are recorded, participants should be notified in advance.
5. Participants should be expected to review the agenda prior to the call and to have supporting materials available to them during the meeting.
6. If your meeting format includes a long meeting with some of the participants meeting live, try to break up the time into segments, so that the teleconference contingent can take breaks without missing important business.

## **Technology Considerations**

1. Do your homework! Is telephone is the best communication tool for your task or purpose? There are several online conferencing tools ("NetMeeting" is included with Microsoft operating systems, and allows the ability to share desktop applications, and some conferencing services allow a combination of computer and telephone conferencing.) Often the decision will be based on the need to communicate visually. It's helpful, for instance, to have a budget spreadsheet or complicated diagram available on a participant's desktop. Also, consider the use of some of the newer video camera conferencing software being included on new computers. Many instant messaging services have this feature available, as well.
2. For a conference call, send all participants the dial in number and pass-codes well in advance of the meeting time.
3. Be clear to participants whether or not you are offering a toll free number or if they are responsible for long distance costs.
4. Have a back up plan for potential technology failure, and make sure participants understand this alternative.
5. It's a good idea to have a second person on the call with leader privileges, should the call leader need to leave the meeting early. That way the call will not get cut off without the primary call leader.
6. Will you have impaired participants? Many services offer additions for the hearing or visually impaired. Make sure you understand any obstacles prior to setting up the call.

## **Scheduling and Preparation**

1. Consider participant availability just as you would for any other meeting.
2. Consider time zones when scheduling and include the time zone in your meeting announcement.
3. Distribute an agenda and background meeting packet well before the call begins.

4. Inform participants in advance if they should open a website or file on their computer desktop (you may want to post your agenda or other reports on a website which everyone can access during the meeting.)
5. Maintain an attendance list with name, email and contact phone number in case you need to reach an individual before, during or after the call.

### **Starting the Call**

1. The facilitator should plan to log on at least 5 minutes early and be the first online.
2. The facilitator should greet each new arrival and always know who is present throughout the meeting.
3. The meeting chairman or facilitator should establish a protocol of each participant announcing his/her name when speaking.
4. Ask for a motion or consent from the group to approve the agenda. If appropriate, group routine business items (approval of minutes, etc.) into a consent agenda to save time.
5. At the beginning of the call, the Chairman should ask if there are any individual time limitations and if possible adjust the agenda accordingly.

### **Participant Etiquette**

1. If you are a participant, try to call from a quiet location.
2. Avoid cell phones if possible. If you use a cell phone, use a mute function when not talking.
3. Avoid speakerphones, poor quality headsets, and some cordless phones which may have a distorted sound quality
4. Don't use the hold button if your phone system has built in background music or announcements.
5. Avoid paper rustling and background noises, such as keyboards.

6. Announce when you are leaving or returning.
7. On long calls, the chairman should offer stretch and bathroom breaks to the participants.
8. As a participant, you should always speak clearly. Slow down, articulate, and be aware of your accent, if you have one.
9. If you are making a presentation of any length, vary your voice and add expression.

### **Attention & Engagement**

1. As the Chairman, understand that it will be important to ask a variety of people to speak, in order to keep attention. For instance, ask two people to make a long presentation. Or structure the agenda so that a new voice is heard every few minutes. Don't let people who are more comfortable with talking dominate a meeting. Single out quiet participants and ask for their contribution.
2. As the Chairman, make an effort to involve everyone. Don't let one or two people monopolize a meeting, or talk longer than they need to make their point. Use people's names to get their attention. Ask different people in the group to moderate different sections of the agenda.
3. Keep the group focused on the agenda. Remind the participants that the agenda was adopted at the beginning of the meeting. If a new topic surfaces and requires further attention, schedule the subject for a later meeting.
4. It is even more important in a phone meeting for the chairman to clearly re-state the motion being considered before a vote is taken. Ask for a voice vote if any question exists, and clearly state the outcome.

## **Involving Participants**

1. At the end of the call, the chairman should summarize the meeting and list the next steps.
2. The chairman should offer participants an opportunity for final/closing comments.
3. End the call promptly.
4. Take meeting minutes or assign this job to a participant. Consider using a 'to do' list following the official minutes, and itemize the actions for which people volunteered or to which they were assigned, the name of the person responsible, and the report or completion date for each item. Follow up, and report results at a future time.
5. Distribute minutes as soon as possible (within 24 hours).

## **Evaluation/Feedback**

1. After each meeting, use some form of feedback or evaluation tool to help improve subsequent calls. A simple evaluation can be verbalized by the chairman at the conclusion of a call, or could be accomplished by emailed questionnaire, or online survey tool like Zoomerang.

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