Tips for Conference Calls

12 useful tips to consider when organizing your conference calls/meetings:

<u>Tip #1: Put Someone in Charge</u>
All meetings need a leader, and phone meetings are no exception. One person should manage the call, though this need not be the team leader. This “control” person (or facilitator) monitors who has the floor, tries to ensure that everyone is heard, that no one goes off on a tangent - and summarizes what is discussed.

<u>Tip #2: Always Identify Yourself</u>
Get into the habit of identifying yourself every time you speak, or at least until people tell you they can recognize your voice. Also remember to state your name before answering a question, especially if you are not the only participant expected to answer. On almost all conference call systems, when a person is speaking s/he cannot hear what another person is saying. So refrain from saying “Yes, I understand” or “Uh-huh, I agree” when someone else is speaking as such comments will not be heard and may prevent you from hearing the other.

<u>Tip #3: Use Your Voice, Not Your Eyes</u>
In a face-to-face meeting, it's easy to look at the person to whom your comment/question is directed. This cues the person to respond. On a conference call, you have to ask the person directly – example: “Paula, what do you think of…” or “Paula, as I understand it, your needs are x, y, z. Is this correct?” (Re-affirm what you *think* you heard).

<u>Tip # 4: Have a Clear Agenda/ Goals</u>
Preparation is KEY, especially in conference calls - At the very least, have a set agenda with approximate time limits for each item, and one or two goals for the call. Without an agenda and clear goals, calls can drag on forever due to endless tangents. Allow at least 45 minutes for your initial call and at least 30 minutes for follow-up calls. Be sure to send out the agenda and goals for the call two or more days before hand to give people a chance to respond and suggest revisions.

<u>Tip #6: Know Everybody's Name</u>
Since you don't have the luxury of seeing people in person on a conference call, it's crucial for the facilitator(s) to have a list of everybody's name in front of them. This is especially important for doing a go-around. You should use go-arounds more often on a call than in face-to-face meetings because people can't see when someone else is about to speak. When doing a go-around, the facilitator needs to call on each person by name since there's no circle or order for people to follow.

<u>Tip #7: Slow Down</u>
Make a conscious effort to speak clearly and slowly, and stop periodically to ask your colleagues if they are following along – this is especially important when a language barrier is present for some participants.

Tip #8: Select a Quiet Environment
Conduct the conference call in a quiet setting where you can concentrate and the group can hear you. If possible, avoid common distractions such as air conditioners, printers, ringing phones, fax machines, paper shuffling, or loud voices. Closing your office door will minimize these distractions. Too many people in the room doing too many things will create feedback.

Tip #9: Prepare for the Unexpected
Not every question can or should be answered on your conference call. Whether the issue requires more information from another individual or is deemed inappropriate, your team should have a plan for addressing some questions at a later time. For example, you could say: “That's a great question, Bill. I would like to have more time to discuss this with you off line. I have your contact information, and I will get back to you by the end of the week.” You may also mention the need to get in touch with your team first.

Tip #10: Provide Positive Closure to Each Exchange
Make sure you have addressed questions properly. For example: “Thanks for the question, Catherine. May I help you with anything else?” Check with other parties to ensure all questions have been tackled to everyone’s satisfaction.

Tip #11: State Your Appreciation
Wrap up your program by thanking all participants for their questions and comments.

Tip #12: Follow-Up
Aside from specific tasks assigned during the meeting, a good general follow-up practice may be to send the community partner a condensed set of minutes two or so days after the call, and then checking-in with them shortly thereafter to see if they are ok with the minutes/ on board with the way things are going.

Meeting Minutes

Notes:	What to include:
• The note-taker should be someone other than the facilitator without an excessive amount to say • Send the notes out to everyone as soon as possible after the meeting • Short, succinct notes that summarize the call are best	• The names of people present, date, place, and time of the meeting • Assignments, tasks, and deadlines (be sure to include who is responsible for each task)