



Teleconferences Setting Up for Success

Pre-Call Preparation

- Since you're coordinating the calendars of several busy people, scheduling a teleconference can take many days. Give yourself at least one week before the desired meeting day to find a time convenient for all.
- Check with the service provider you choose if they require a reservation and if so, how much notice do they need. Make sure that the date and time you want is available.
- Decide on the options you will use for your call. Will it be dial-in or dial-out? Do you want it recorded? Once again, your service provider will give you guidance in these areas.
- Make a list of all attendees and check that their availability on the date and time planned. Obviously, the more notice you can give them, the more likely they are to be on hand for your meeting.
- A teleconference can become unmanageable with more than eight people, so try to limit the number of participants to those whose presence is truly required. Include people who can make a significant contribution to the discussion, and copy people "who need to know what's happening" on the minutes following the call.
- One week prior to the meeting, solicit input for items to add to the agenda. Send out a detailed meeting agenda at least two days prior to the call, specifying the meeting objective and decisions to be made. Keep the process simple and the schedule short. Most people can't pay attention while listening and looking out into space for more than about thirty minutes. If you have more issues than time, plan several teleconferences to discuss different goals.
- Test out the teleconferencing equipment 2-3 days prior to the actual meeting. Conduct a few trial runs with the other locations to ensure you can hear them and they you. Surprises are not fun on the day of the meeting and frustrated participants have to sit around while you troubleshoot the equipment.
- Send out handouts and supplementary material early so participants have time to read them and prepare for the meeting. Include a written agenda and short biographical information on the participants, especially when people are not familiar with each other.
- Include the teleconference phone number and PIN number with the messages one week, two days, and the day of the meeting. As a safety precaution, give your name and contact information in case any of your callers experience problems.
- Contact all participants and give them the date and time of the teleconference. Always remember to specify the time zone. To avoid any confusion, you might consider listing the various times in the particular time zones. For example, if your meeting is scheduled for 1pm EST, list 12noon CST, 11am MST and 10am PST.



During the Call

Review guidelines and rules of etiquette and engagement for participants to follow:

- Use the “mute” feature of the phone when you’re not speaking, so participants can’t hear your background music or barking dog. Some systems allow the facilitator to “mute all” participants, taking them off mute at selected times to ask or respond to questions.
 - Be present. “I’m sorry, I wasn’t paying attention; could you repeat the question?” is an all-too-common phrase heard during calls. Don’t risk looking unprofessional. Stay focused. As good as you think you are at multi-tasking, the conscious mind is not capable of reading email and listening to a speaker at exactly the same time. Surfing the net or pressing the mute button so you can carry on another conversation effectively removes you from the meeting.
 - Keep side conversations to a minimum. It’s frustrating as a remote teleconference participant to hear “babbling” in the background. It’s difficult to distinguish the actual speaker from the other noise and sounds like a constant echo on the line.
 - Read all pre-work and be prepared to participate actively in the conversation. Just because no one can see you does not mean your voice won’t be missed if you’re silent.
- The person who calls the meeting can act as the “voice traffic controller,” or another person may be appointed. The facilitator is responsible for keeping the meeting moving and on track. The facilitator notes the topic to be discussed based upon the timed agenda and asks specific people to report out.
 - Before you speak, remember some people may not recognize your voice. Even if you think, “everyone knows me,” always begin with “This is Laura,” and then speak. When you pick up the conversation again, repeat, “This is Laura again.”
 - Don’t be afraid of silence. Because the phone is devoid of facial expressions, you can’t always read emotion. Someone may be formulating a question in his or her mind and need another minute to chime in. Silence doesn’t always imply consent. Make sure someone has finished speaking before you begin, or you will end up interrupting others mid-sentence.
 - If a group of people are meeting in the same room, with other remote sites dialing in, try to make the virtual participants feel included. If someone cracks a joke and busts the group up with laughter, let the others know who said what and repeat the joke.
 - Begin at the scheduled time. Don't wait for latecomers. Rather acknowledge and be sensitive to the "on-timers." Laggards will quickly realize that starting on time really means starting on time. Chances are that they will only be late once.
 - Take a roll call at the beginning of the conference so that everyone knows who is involved and listening. If participants don't know each other, briefly introduce them or have them introduce themselves.



- Begin with enthusiasm, setting the tone for an upbeat and positive meeting. This is especially important if participants are going to be on the call for a long time. Since your voice is the only means of communicating with them, it needs to be interesting to listen to.
- Outline the objectives and the agenda of the meeting. Send participants the agenda ahead of time so that they can follow along.
- Give participants the basic rules and guidelines for the call. Cover speaking time limits, instruct them to pause occasionally so that others have a chance to respond, and quickly go over the most important etiquette points.
- Organize your presentation and discussion into clear, concise points. This makes it easier to follow and avoids possible rambling.
- Keep an eye on the clock to ensure that you are following the agenda you've created.
- Keep track of who is contributing to the discussion and who is not. Quiet participants may need some coaxing. Engage them by asking a question or ask for their opinion on the subject being discussed.
- If you are not using the OPG method, pause periodically throughout the teleconference to get feedback and to take questions from the other participants. In the training arena, presenters try to break up their session every 8-10 minutes to do another activity, such as Q&A. You might try a similar timing. It's tough listening to the same person for an extended period.
- Schedule a 5-10 minute break every 45-50 minutes for long conference calls so that people can refresh themselves.
- Before ending the meeting, go around the virtual room and address each person by name asking for any questions or comments they have as a result of the discussion. You might even ask them what was the most important point they heard.
- End the teleconference clearly. Briefly go over what was discussed, clarify any action participants need to take, and finally instruct them to hang up.

Adapted from:

- <http://theproductivitypro.com/blog/2012/05/effective-teleconferencing-tips-for-virtual-teams>
- http://www.corbinball.com/articles_technology/index.cfm?fuseaction=cor_av&artID=1809

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