

# Conferencing Tips

Here are some suggestions for running successful meetings using teleconferencing solutions.

## Before Each Conference Call

- **I need to communicate with a group. Is conferencing my best choice?**  
Whenever there is a need for three or more geographically-dispersed individuals to meet, teleconferencing can be the smart choice. Relying on teleconferencing instead of traveling to meet face-to-face saves money and time. And because it allows teams to meet more often and with less advance notice, it can lead to better overall communications and coordination.
- **To maximize participation, be considerate of everyone's schedules.**  
It can be a challenge to find a suitable time window for a larger group to meet, especially if multiple time zones are involved. But the more each essential participant's schedule can be accommodated, the more effectively they can be expected to contribute.
- **Notify all participants of the date and time of the call in advance.**  
Give as much lead time as is practical, to reduce the potential for schedule conflicts. Some characteristics of an ideal teleconference invitation are:
  - ◆ It identifies those whose participation is essential vs. those whose attendance is optional, or are merely being notified that the meeting is taking place.
  - ◆ It requests that all essential participants either attend, or arrange and a suitable substitute who can act on their behalf.
  - ◆ It states whether this teleconference is considered open or closed, meaning whether invitees may include others at their discretion.
- **Publish an agenda.**  
Having an "official" agenda to work from helps keep meetings focused and on track. If the agenda is made available before the call, then participants can be expected to come better prepared to address its topics.
- **Communicate any items that may need to be prepared in advance.**  
For example, any documents to be reviewed.
- **Arrange to be in a quiet location where you won't be disturbed.**  
If any of the other participants are co-located with you, it should help to arrange for a suitable conference room in which to base your teleconference.
- **Send out a friendly reminder before the event.**  
It should be unnecessary, but any simple action that can help ensure a successful meeting is typically worth doing.

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## Starting Each Conference Call

- **Start the teleconference call a few minutes early.**

When the Moderator is already online, arriving participants are placed directly into the conference, rather than having to go on hold until he/she connects. Being the first person in the call allows the Moderator to greet each participant, deal promptly with any operational issues, and discourage any premature discussions.
- **Lock this call (if needed).**

If this is to be a secured teleconference, then the Moderator would typically lock the call before beginning the meeting, so that no further parties may join. The Moderator phone command for this is **\*4**.
- **Start recording (if needed).**

If this teleconference is to be recorded, then the Moderator would typically start the recording before beginning the meeting. The Moderator phone command for this is **\*2**.
- **Introduce yourself as you start the call.**

Everyone may not recognize your voice.
- **Briefly state the purpose and goal(s) of this teleconference call.**

Summarizing the major points of the agenda can help get everyone progressing in the same direction.
- **Conduct a roll call.**

This helps everyone know who is participating. The Moderator can use the **\*#** phone command to determine the participants known to the conferencing system as a cross-check.
- **Announce ground rules for this teleconference.**

Although it may seem elementary, it makes for a smoother teleconferencing experience if all participants remember to:

  - ◆ Turn off their cell phones and pagers.
  - ◆ Deactivate Call Waiting before dialing in to a conference call, so that any audible signal announcing a new call doesn't intrude on the conference. This can typically be done by dialing **70#** before dialing the conference bridge.
  - ◆ Refrain from placing the conference call on hold, which can subject the remaining participants to Music on Hold.
  - ◆ Avoid using mobile phones, because the noise level they inject can make it difficult for everyone to hear clearly. If a participant must use a mobile phone, then the best approach is to keep it Muted except when he/she is actually talking. If that participant is on the road, it

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may also be necessary for him/her to pull over in a spot where there is strong cellular coverage.

- ◆ Also avoid using speakerphones, except for specialized conference phones located in quiet environments. The typical desktop speakerphone can pick up a surprising amount of background noise, which can be enough to be intrusive.
- ◆ If an individual is experiencing a noisy connection, typically the first thing to try is to hang up and call back in. Note that this can be an issue if the teleconference has been locked, however. (The Moderator phone command for unlocking the conference is \*5.)
- ◆ Each speaker should introduce himself/herself when speaking for the first time.

## During Each Conference Call

- **Start on time.**  
This is usually an essential step to meeting the goal of ending on time.
- **Drive each conference call according to its published agenda.**  
Politely but firmly table any discussions that are not relevant to the agenda, announcing that they will be noted in the minutes for later follow-up. It may seem polite to allow participants to discuss whatever they feel is necessary, but it shows greater respect for the time of all who agreed to participate in that conference to restrict the topics of discussion to the expected agenda.
- **Try to stay on schedule.**  
Encourage the discussions to stay bounded by the time duration assigned to each major topic by the agenda, and above all try to keep each call from running late.
- **Deal promptly with any noise or distractions.**  
Allowing all participants to remain focused on the purpose of the teleconference tends to maximize its value.
- **Try to involve all essential participants in the discussion.**  
Ask for feedback, especially before moving on to the next agenda topic. Participants will be less likely to interrupt if they know to expect structured opportunities to contribute. Also, it can be more effective in achieving 100% participation to ask specific participants for their input, rather than just opening the floor to the entire group.
- **Have someone taking notes.**  
The Moderator may take his/her own notes in smaller meetings, while arranging for someone else to perform this function in larger gatherings can allow the Moderator to remain focused on guiding the meeting.

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## Wrapping Up Each Conference Call

- **Summarize the call.**  
Summarize the issues that have been discussed and recap any decisions resulting from the call.
- **Perform a final roll call.**  
This can accomplish multiple purposes, including:
  - ◆ Determine who has stayed until the end of the call.
  - ◆ Asking each essential participant to summarize their own goals, commitments and action items resulting from the discussion can lead to more certain follow-up. In particular, the note taker needs to pay attention in order to remind participants of any tasks left out.
- **Set up your next conference call.**  
If any more sessions will be needed with the same audience, then choosing the optimal date and time for the next call while everyone can speak up is usually the most efficient way to schedule.
- **Allow the call to continue (if needed).**  
Normally a conference call terminates as soon as the Moderator disconnects from it, but he/she does have option of allowing it to continue as long as any participants remain. The Moderator phone command for this option is **\*8**.

## After Each Conference Call

- **Publish meeting minutes as promptly as possible.**  
The minutes of a teleconference, like meetings in general, document the history of what was discussed and decided. In addition to summarizing the major discussion points, decisions and open issues, the minutes can be a useful medium for “closing the loop” in terms of:
  - ◆ Reviewing goals, commitments and action items per participant.
  - ◆ If there are any unresolved issues which might still be confusing after the meeting, consider distributing a feedback form for the participants to fill out and return.
  - ◆ Any attempted discussions which were tabled as falling outside the agenda need to be documented.
- **Carryover any unresolved or incomplete issues into the next agenda.**  
Provide continuity between sessions by extracting from the just-used agenda any items that need further attention during the next session (if any).