

Tips for Facilitating Phone Conferences and Meetings

The following is a summary of tips for conducting virtual phone meetings. Many of these can be used with web or videoconferences, but the technology issues may be different.

- 1. Setting up the call:** Limit audio teleconferences to 90 minutes maximum. Plan to stop at the agreed-upon maximum time for the call, even if you have not completed the agenda. Don't cram the agenda. An hour on a teleconference generally cannot accomplish quite as much as an hour face-to-face. 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, that means you can accommodate 1-2 agenda items in an hour. If you don't have a conference line, consider using something like <http://www.freeconferencecall.com>, <http://www.skype.com>, <http://www.nocostconference.com/>
- 2. Send out an agenda ahead of meeting that clearly establishes the purpose and outcomes for the meeting.** Facilitator/Leader should create an agenda and gets it to participants at least one day before the phone conference. The agenda should include the purpose of the meeting, the expected outcomes, the suggested steps for achieving the outcomes, and the names of all participants. Send out well ahead of time any materials that participants need to review for the conference. Included on the agenda is the method people will use to connect to the conference and any call-in numbers needed to connect. Let people know that the call will start promptly at the agreed upon time.
- 3. Have one person as the facilitator:** One person is the facilitator, moving the group through the suggested steps on the agenda. The facilitator or someone else can be designated to take notes during the conference and getting the notes out to participants within 24 hours. Best practice is to e-mail immediately following the audio teleconference.
- 4. Beginning the meeting and establishing "ground rules" at the start of the call.** Begin the meeting by introducing yourself, the role that you will play, stating the objective of the meeting, and giving instructions for participant involvement. Take a roll call. This will give attendees an opportunity to let you know they have joined the meeting and avoid folks talking over each other while trying to let you know they are on the call. It will also help those on the phone know who is at the meeting and who is not. **Here are some of the most common ground rules:**
 - Say your name each time you speak.
 - Use your mute button to eliminate background noises.
 - Focus your comments and keep them short.
 - Speak loud and clear enough for all to hear
 - Wait for one person to finish before speaking; otherwise, comments will be muddled or cut off on speaker phones.
 - Stay on the call from start to finish
 - Be fully present. Try not to multitask
- 5. During the call:**
 - If you are the leader or facilitator: Keep a list next to the phone identifying those who are on the call. This will remind you who is on the phone and to include them in the conversation. Call on people you have not heard from during the meeting to give them an opportunity to participate.
 - If you are the leader or facilitator: Stick to the agenda, control interruptions, anticipate problems and be prepared with solutions and make frequent changes in speakers by calling on specific participants for their input or questions. "Round-robin" speaking can be used at audio teleconferences. The facilitator calls on each participant in turn and asks for comments. Use the participant list and call on each person in the same order each time there is a discussion. This avoids one person being cut off before he or she is finished or more than one person trying to speak at once.
 - Enunciate clearly and use concrete examples. Speak at slightly slower than normal speed. Experienced communication observers report that conference participants are heard more clearly if they slow down their delivery a bit. Tone of voice is very important during a conference call.
 - Listen for folks who may be more comfortable talking (avoid dominance) or very quiet. Generally, the larger the group, the more directive your facilitation needs to be to keep a small number of people from dominating the call.

- Name names: Call on people by name and location ("Chris at Beechwood, what do you think...?") when asking questions or soliciting their reactions.
 - If you don't want to ask each person to respond to a general query ("do you understand the new procedure?"), let people know 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.
 - Listen actively and avoid interrupting. Indicate your attentiveness by using "verbal nods," which include phrases such as "That's interesting," "Oh, really," "Uh-huh," "Good," "I see," "Please go on," "Yes, I understand," and "Could you please say more about..." Be patient with other speakers and don't butt-in or jump to conclusions. Then, make reflective statements and ask questions to verify and clarify what you hear."
 - Before moving from one agenda item to the next, the facilitator summarizes the discussion, the actions agreed upon, or the next steps for doing agreed-upon actions.
 - Pause halfway through the meeting to check in with participants about the meeting process. Ask them what's going well and what needs to change and incorporate this feedback into the second half of the meeting. Checking in halfway allows the facilitator to adjust before the end of the meeting.
 - Identify the appropriate next steps before the end of the call. Schedule subsequent calls or meetings before completing the call.
 - At the end of the call, the facilitator summarizes the discussion and clarifies the actions agreed upon. Persons responsible for action items are named and one person designated as "responsible" if more than one person is working on an item.
6. **After the call:** As soon as possible after the call, the summary notes and agreed upon actions are sent out to all participants.

Other Tips:

One of the most common mistakes when talking on the phone relates to voice tone. "A voice tone that is monotone, impolite, distracted, or unprofessional in any way sends an immediate negative message. Over the phone, your voice—more than any other element--conveys your emotional attitude toward the caller, so it's critically important to send the right message through your voice."

"Just Three Words" – Phone comments can drag on, especially for large groups. This game originated as an online text technique but works well to surface a sense of the group and get fast feedback. The technique is to 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?" The notes from these exercises can then be later reviewed and observed for similarities, differences and patterns.

Multitasking is another common mistake, "Since listeners cannot see you, it's tempting to covertly catch up on other tasks while attempting to carry on a telephone meeting. Not only are you likely to miss critical points in the conversation, the listeners can hear awkward pauses and a tone of distraction in your voice."

Resources Used:

[https://wiki.sos.wa.gov/PeerLearning/\(S\(0hivop55g5dhx22zc1ehp5yu\)\)/Print.aspx?Page=Telephone-Conference-Call-Facilitation-Tips](https://wiki.sos.wa.gov/PeerLearning/(S(0hivop55g5dhx22zc1ehp5yu))/Print.aspx?Page=Telephone-Conference-Call-Facilitation-Tips)

<https://www.poynter.org/reporting-editing/2014/managing-by-telephone-10-ideas-for-a-better-conference-call/>

https://hr.harvard.edu/files/humanresources/files/tips_leading_a_meeting_with_remote_participants.pdf

<https://www.forbes.com/sites/jacquelynsmith/2013/06/28/speak-with-impact-12-tips-for-better-telephone-meetings/#35df03717678>

<https://www.meeteor.com/post/engaging-virtual-meetings>