

MAKING AUDIO TELECONFERENCE CALLS WORK

IDEAS AND TIPS FOR PARTICIPANTS

Before Your Teleconference:

- Arrange for someone else to handle your work while on the call. Don't allow interruptions.
- Do your part to encourage a focused approach to conference calling. If an agenda is not pre-published, ask that one be developed before the call gets in full swing.
- Look over any related materials before the call so that you can stay with the group during the call.
- Get your coffee or beverage, go to the restroom, and so on, before the call so that you're not frustrated while on the call.
- To avoid distractions choose a quiet room, think about other people talking nearby, printers, copiers, external noises etc. If you are working from home think about dogs and other pets and put them in another room to avoid a barking session in the middle of your teleconference. Use the Mute Button on the telephone (see **Equipment** later)
- View the conference calls as an opportunity to sharpen your listening skills.
- Be on time for the call. Calls patching in after the conference has started are even more disruptive than late entrances to face-to-face meetings.
- For an important teleconference, you can establish a memory system of the people who are on the call by making name placards out of index cards and placing them on a table. You can even have a photograph on the card and look at it when addressing your comments. If you are part of a team that audio teleconferences frequently, make reusable placard cards with each team member's picture.

During Your Teleconference:

Equipment

- If using an ordinary Telephone - hold the receiver away from your mouth. Breathing noises may cause interference on all the phone lines. Some people breathe 'heavier' than others and most of the heavy breathers don't realise it. So hold the mouthpiece or telephone headset microphone a bit away from your mouth and nose, unless you are speaking. This sounds pretty silly, but when you're on a call with a heavy breather, you'll understand why it matters!
- If you have a two-line phone, turn the ringer off of the second line. If you don't, and you get a call during the Tele-Conference, it can really be a shrill noise that everyone hears.
- Consider acquiring a shoulder rest for your phone if it is a lengthy teleconference.
- Lightweight headsets are the best tool to use for audio teleconferencing. The headset should attach to the phone with a long cord so you can move about the room. This investment, once you get used to using it, will payoff in improved productivity in much of your other work also.
- If you do a lot of teleconferencing, invest in one of the recently improved types of speakerphones, which enhance your voice quality substantially.
- If people are sharing a speakerphone, everyone should move close to the micro- phone so they are clearly audible. Better speakerphones can pick up from a range of 12 to 15 feet. Most are only effective in much shorter ranges.
- When using a speakerphone, wait until there is a slight pause before speaking; otherwise you may cut off the last speaker before he or she is finished.
- Use the telephone's mute button, if there is one. This can get rid of background noise like people talking, radios, etc.

Getting Connected:

- Don't call the teleconference number before the scheduled time - another conference may be in session. If you're late to the call, just dial in and be silent until you are invited in or catch on to what's being discussed.

The facilitator may or may not officially welcome you - but probably won't so as not to disturb the flow of the call. That doesn't mean you're not welcome! And, finally, if you're more than 10 minutes late, be really careful about asking questions, as they may well have been asked earlier.

- Stay on the line for the whole call. If you must leave before the scheduled ending time, announce your problem at the start of the call. Accept decisions made by others in your absence.

Contributing:

- If no one is assuming the role of facilitator for the call, suggest that someone do so. (See Facilitator Guidelines for Teleconferencing)
- If there is a Facilitator wait until you are asked to contribute. The facilitator will usually ask for callers to share or respond, throughout the call. However, wait to be prompted - don't just speak up, unless invited. If/when you do contribute, say something like, "Thomas (or the facilitators name), this is Bob from IBM." The Facilitator will say, "Yes, Bob, go ahead." Then you can say whatever you'd like to. Always use the facilitators name and wait until they respond, indicating that you can proceed. On smaller calls this formality isn't usually needed and there is a natural flow to people sharing and discussing.
- The Agenda may be constructed so that you are allocated a time to speak or the Facilitator may use a Round Robin System. Here there will be a preset order for speaking and this is just repeated.
- If another caller says something that you want to comment on or ask more information about, go through the facilitator, don't speak to the person directly, at least at first. Let the facilitator play traffic director. You could say something like, "Thomas, can I ask that Marlene rephrase the point she just made?" Again, on smaller calls, this isn't as necessary, but on the large calls, it really is.
- Speak at slightly slower than normal speed. Experienced communication observers report that conference participants perform better if they slow down their delivery a bit.
- Be especially conscious of your tone and vocal inflections. Research indicates that people interpret vocal cues more accurately than facial expressions or body language. Alliances and factions are more easily recognized, as are resisters and supporters.

Keeping up

- Take notes. Jotting down notes holds your attention in the absence of face-to-face contact. Take the notes according to who says what.
- Keep notes about points you want to make. Don't offer your thoughts immediately. Wait until it's your turn, or until you have several things to say. You will be amazed how often others will say what you are thinking, saving you stress on your vocal cords.
- If there isn't a facilitator or they don't do it - clarify decisions and agreements before the group moves from one agenda item to the next. Ask that responsibilities for actions be clarified and only have one person named as responsible for that action.
- Be conscious of your "air time". Don't overdo and don't hold back. Again if there isn't a facilitator - ask for the thoughts of others who may not be contributing.

After Your Teleconference:

- Each person should sign off at the end of the call, letting others know he or she is going off the line. If some people want to talk after the call for any reason, this should be arranged between them while all the other people are still on the line
- Check that follow-up notes will be distributed to all members.

ACKNOWLEDGMENTS

These Guidelines have been prepared by Gary Purser of Gary Purser & Associates, www.gpassoc.com.
Special thanks go to Telebridge Teleconferencing BT for contributing to this guide.

FACILITATING EFFECTIVE AUDIO TELECONFERENCES

FACILITATOR GUIDELINES

Considerations:

- Some of the main advantages of Teleconferences are:-
 - Convenience - participants can call in from anywhere in the world.
 - Low cost: because there are no travel expenses or lost travel time.
 - International scope and diversity - the current range of inexpensive telephone rates worldwide make it economical for participants from all over the world to work with each other in real time.
 - All you need is a regular phone--no computer or special equipment is needed.
- Issues you must address if you are considering Teleconferencing:-
 - Find out why the client is determined to have a conference call - Is this the best way to deal with this Issue – could it be done by an e mail chat room, normal e mail, a series of one to ones, or does it need a fully facilitated meeting?
 - Do a reality check: 15 people in one hour gives only 4 minutes per person to speak on average.
 - Does the Issue require high levels of personal interaction, trust, relationship building - or is it highly complex or technical - does it involve constructing models or difficult concepts – is it highly dependent on visual images etc. – if yes then it is often better to arrange a face to face meeting so people can get the feel of each other.
 - What impact will it have with participants not being able to see what is going on e.g. Visual Aids, participants body language etc. – But you could consider using Groupware IT Systems to link participants worldwide in real time.
 - The effect of different time zones if the Teleconference spans several countries or large distances. Also remember Seasonal time differences in European Countries.

1. Getting Connected:

- One person should be responsible for arranging the phone connections for the conference.

2. Conference Design:

Agenda

- One person should be responsible for constructing an agenda and getting it to participants at least one day before the phone conference. The agenda should be limited to a page and include:-
 - The method people should use to **Connect** to the conference and any call-in numbers needed to connect or re-connect if they should get cut off. These should be described in the simplest possible terms with clear instructions.
 - The full **Names** of all participants. This may include a short Pen Picture if participants are not known to each other or even a photograph.
 - The **Purpose** of the conference – clearly scoping what the teleconference covers and does not cover – this helps avoid ramblings and going off course.
 - The expected **Outcomes** – this allows everyone to know what the teleconference is aiming to achieve and allows the facilitator to focus all contributions towards these ends.
 - The **Process** for achieving the outcomes – this serves as a route map so people know what is coming – this helps keep the meeting on track and stops people leaping ahead as they can see at which point they can introduce specific inputs.
 - The suggested **Timings** for each part of the Process and the overall time of the Teleconference. This could include a named order for contributions and times of those contributions.

Timing

- Good Practice shows that teleconferences should be limited to 90 minutes as a maximum.
- Well-organised conference calls should take: less than an hour to conduct. You should stop at the agreed-upon maximum time for the call, even if you have not completed the agenda.

3. Conference Materials:

- Send out well ahead of time:
 - The **Agenda**
 - **Any materials** that participants should review for the conference.
 - The **Audio Teleconference Participant Tips** unless you are sure that all the participants are already well aware of them.

4. Facilitation:

- One person should act as a facilitator – ideally they should not be the group leader or anyone closely connected to the subject matter. Their role is to act as a neutral Process Facilitator.
- Their main activities will be to:-
 - Work with the Group Leader or Topic Owner to define the Purpose and desired Outcomes of the meeting - to design a Process that will deliver these Outcomes – to construct a Timed Agenda around the Process.
 - Welcome people to the Teleconference as they join – this may not always be possible if there are latecomers to the meeting. This is a difficult call and facilitators will need to take into account everything else that has gone on, is going on and is still to come.
 - Confirm that everyone can participate for the duration of the call; if someone must leave, tell the group so they all know they left.
 - Use a "Clock On" Process on conference calls to help people get and keep a sense of place and participation in a disembodied conf call.
 - Ask every one to draw a circle on a piece of paper and mark the hours like a clock. Then as they join the group, each person is assigned a spot on the "clock". So the first person is 1 o'clock, the second 2, etc. If there are more than twelve, start adding 1:30, 2:30 etc.
 - Use this initially for intros -- the first go round, then use it to ensure everyone speaks, and also to match names/voices/input. You can keep little notes on the "clock" as well
 - Confirm the Purpose, Outcomes and Agenda and – if applicable - check everyone has done the preparatory work (reading etc.)
 - Act as a timekeeper for the Process – this can be delegated to a separate person
 - Remind people of a few conference-calling "**Ground Rules**" at the start of the call. These are some of the most common ground rules:
 - ✓ Always identify yourself. (Have participants state their names when they begin speaking "Tony here...." so we know who is speaking and the facilitator can call on those that haven't said much)
 - ✓ Speak when asked or in the order of your name on the Agenda. You can pass if you have no comment.
 - ✓ Wait for one person to finish before speaking; otherwise, comments will be muddled or cut off especially on speaker phones.
 - ✓ Stay on the call from start to finish. If you cannot stay on the call, let people know at the start of the call.
 - ✓ No interruptions. Have someone else handle business while you're on the call.
 - Move the group through the suggested Process on the agenda - call in and close down speakers as required. You can use a Round Robin approach so that everyone knows who they speak after or before. This can be agreed upon and pre-circulated with the Teleconference Agenda (See 3 above)

- Before moving from one agenda item to the next, summarise the discussion, any issues raised, actions agreed upon, or the next steps for doing agreed-upon actions.
- Maintain a brief running record of the teleconference so they can remind participants of earlier points made etc.
- To overcome the lack of visuals, ask people to imagine that they're all in one room and that you'll really have to listen to "see" what's going on. Just like in a face-to-face meeting, you can hear it if people are multi-tasking or disengaged or holding back.
- It can help to keep track of who hasn't spoken up by using a Matrix of **Participants** across the top and **Time** down the side. Then as people speak you can give their box a tick at the appropriate time and a short note of their input if useful in your summarising.

	Frances	Nigel	Minu	Robert
0900		✓ Content input on water in Watford		✓ Question
0910	✓ Took Action to follow up. ✓	✓ Question ✓		
0920	✓	✓	✓	✓
0930	✓		✓	
0940	✓			
0950		✓	✓	✓

- To help with your summary of the proceedings you can actually use a flip chart to capture Key Information at important stages in the discussion.
- Provide a brief summary at the conclusion of the meeting. This should:-
 - ✓ Clarify the actions agreed upon. Persons responsible for action items should be named and one person designated as "responsible" if more than one person is working on an item.
 - ✓ Schedule subsequent calls or meetings before completing the call.
- Close the Teleconference – the Group Leader may wish to do this and the facilitator should build in time and brief them re this.
- Each person should sign off at the end of the call, letting others know he or she is going off the line. If some people want to talk after the call for any reason, this should be arranged between them while all the other people are still on the line
- Ideally the meeting notes should be circulated to participants within 24 hours. Best practice is to e mail or fax notes immediately following the teleconference.

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