Conference Calls

Meeting Skills

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Preface

Conference calls are one of the most often cited pet hates of employees. Even though the technical problems associated with them are becoming less common, many employees find their motivation to participate and provide ideas are shut down by the impersonal and difficult to coordinate nature of these calls. This eBook explains how to overcome the problems associated with conference calls.

You will learn:

- Why conference calls present problems that normal telephone calls do not.
- What advance planning you can undertake to get the most out of each call.
- Why published guidelines can dramatically improve everyone's experience of conference calls.
- Why each call needs a simple agenda and what information it should contain.
- The advantages of having a named facilitator with clearly defined responsibilities.

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Introduction

Globalization is now a common feature of most organizations. Just as institutions have adapted to fit this new world, so has the behavior of those working within them. Many a manager's working day starts well before they get into the office. You could be speaking to your Australian colleagues at 6am and then updating your Middle East co-workers at 11pm at the start of their working day.

Technology has erased the traditional problem of communicating with colleagues and customers in different time zones. You can now be contactable anywhere, rather than having to be at head office in the special conference suite. You can talk to your colleagues in Dubai on Sunday, the start of their working week, ensuring that they are working effectively every day of the week. Discussions via conference calls enable real-time decisions to be made regardless of the country that each decision-maker is in.
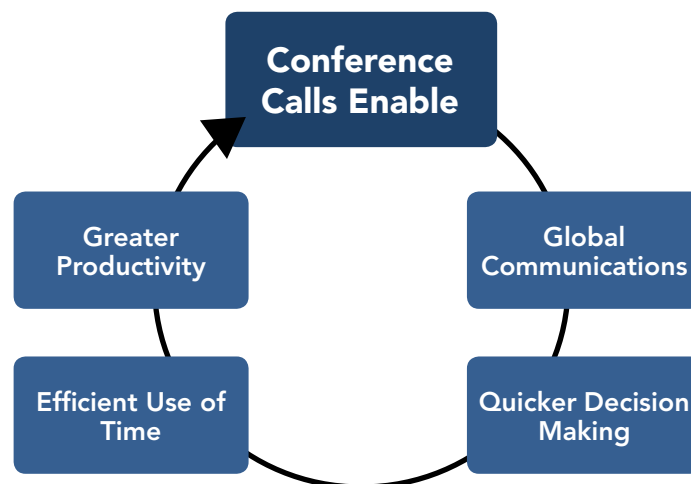
Through the use of conference calls organizations have been able to short-circuit decision-making and reduce the non-productive traveling time and costs that it previously experienced. These benefits have also been passed onto other organizations, such as those of your customers, suppliers, and partners, reducing everyone's costs.

As a manager you need to ensure that this ability to communicate is efficiently used by you and your colleagues and empowers people when performing their roles. You need to encourage proper use of this 'tool' so that it improves productivity and does not become another distraction, like unfocused or unstructured meetings, emails, and texts.

Conference calls play a major role in an organization's communications, both internal and external. Technological advances have meant that at a national event, for example, the poor behavior of an organization's senior officials immediately becomes international news. This means that all those in senior positions must have a much greater access to information as well as a better understanding of it in order to make sound business decisions.

Conference calls have enabled this to occur as they provide an effective and speedy method of communication. The most typical uses of conference calls are:

- Progress meetings
- Project updates
- Gaining approval for decisions
- Strategy reviews
- Training
- Internal communications

Whilst conference calls have undoubtedly brought substantial benefits to organizations by making personnel more productive and saving considerable sums previously spent on travel, they are not perfect. This means that you:

- Have difficulty in controlling such interruptions.
- Have a greatly impaired ability to ring-fence your time so that you can work undisturbed for a period of time.
- Are unable to adequately protect your Work–Life balance.
- May have acquired 'poor' working habits when taking part in conference calls. For example, reading emails, opening post or browsing the web, and therefore not giving the call your full attention.

Incorporating effective working practices will ensure that conference calls enhance your productivity and that of your team.

Nature of Conference Calls

As a manager you need to constantly make decisions; some are key decisions affecting many people whilst others are quite minor and are only pertinent to your team. Regardless of a decision's nature you have a need to receive and inform others of the necessary information or outcome you require. The need for this process to happen more quickly and efficiently is one of the reasons why conference calls have become increasingly popular.
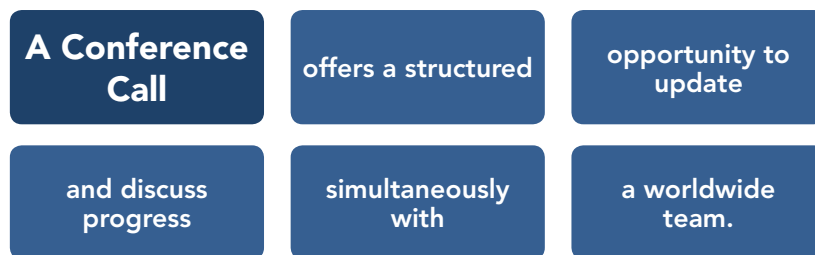

If your team is a business division, this can encompass people working in a variety of different countries, all of whom need timely and accurate communications. Conference calls offer you the ability to talk to the whole team at the same time, ensuring the consistency of your message as well as its speedy delivery.

The most typical ways managers use conference calls are outlined below.

Progress meetings

You will have a variety of projects underway within your division or unit at any one time and it is vital that you stay fully informed of how each one is progressing. Each one will have several key personnel that you need to communicate with regularly, so that everyone is aware of how things are going and what implications any issues that have arisen could have.

Such conversations could involve people from different sites and countries, which would be a logistical nightmare if you were to try to bring them together in one place for a meeting. It would also involve major traveling expenses and non-productive time. Instead, conference calls can easily be set up at an agreed date and time that is convenient to all, ensuring that disruptions to productivity are minimized.

A Conference Call	offers a structured	opportunity to update
and discuss progress	simultaneously with	a worldwide team.

You can organize a conference call that offers everyone a structured opportunity to be kept informed of activities and progress, and the chance to discuss any interdependent activities amongst colleagues. The call enables all pertinent information to be communicated once and any issues to be discussed with all key decision-makers present.

Project updates

Projects involving many different organizations often cause problems when it comes to updating each other on the project's status. Scheduling a meeting that suits everyone's timetable and commitments, whilst possible, often means that meetings are too far apart to be of any practical help in ensuring that the project runs smoothly and on time.

If all key personnel on the project have the capability to communicate using conference calls then updates can be efficiently and effectively managed. This enables decisions to be made in a timely fashion and for all parties to have the opportunity to partake in the decision-making process. Ultimately the project is successfully completed with all parties' interests being addressed and met.

Gaining approval for decisions

Whilst this is not normally viewed as a conference call because the inference is that such calls involve many people, it is possible and practical to have a conference call with three or four people.

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┌─────────────┐      ┌─────────────┐      ┌─────────────┐
│ Conference  │ ──▶  │Help Managers│ ──▶  │of Global Teams│
│   Calls     │      │             │      │      to      │
└─────────────┘      └─────────────┘      └─────────────┘
                                                 │
                                                 ▼
┌─────────────┐      ┌─────────────┐
│Mentor Staff │ ◀──  │  Support &  │
│Development.  │      │Approve Staff │
│             │      │ Decisions & │
└─────────────┘      └─────────────┘
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Often someone working for you may wish to just chat through the reasoning for their decision with you, plus one or two work colleagues, before finally acting on it, and a conference call would be the ideal means to achieve this objective.

This is especially useful and effective as many members of your team may work at other locations, and in other countries, so that physically meeting up with you for this type of conversation is totally impractical.

Offering this option to those reporting to you allows you to mentor them as they develop professionally and be supportive of their decisions. You must remember to manage this conversation in such a way that these calls don't become a constant and unplanned interruption. You will need to set the expectations of your team to use such communication wisely.

Strategy reviews

With the ever-increasing amount of information available to you on your markets, competitors, and customers it is imperative that you review your strategies with key personnel. Completely unforeseen events that require an immediate response may occur and responding may impact on your current strategy; therefore, you need to discuss these implications with your colleagues.

Using a conference call provides you with the ideal vehicle to have the strategic discussions you need to ensure the future success of your organization. Thanks to this tech-

nological advance the right individuals can easily talk together and review the strategic options available to them in a speedy and efficient manner.

Training

Conference calls offer an excellent medium to ensure that the knowledge required for a role is passed on in a timely and efficient way. This could be as simple as a change to how data must be entered into one of the company systems, or an explanation of a new business process.

Traditionally, organizing a training event for a large group of people has been a long-term project. The process involved with using a conference call greatly speeds this up and allows you to reach a wide audience quickly and easily.

Internal communications

Communicating effectively so that your organization's staff are motivated and kept appropriately informed is a vital role for a manager. How best to achieve this will vary considerably between industries and the size of your organization. However, one very effective way of achieving this is to incorporate the use of conference calls as one of the many ways in which you communicate with your staff.

Conference
Calls

Offer
managers
a quick &
efficient
means

of two-way
communication

& to receive
feedback from

customer-
facing
departments

It is also an efficient way of disseminating information from management and supervisor level to the customer-facing individuals. It offers a two-way conversation so that if the news you are asking to be circulated could have implications you can be informed.

These types of call provide an excellent medium for your senior management to bring you feedback from customer-facing departments. This information can then be handled by a knowledge-base and appropriate action can be taken if required.

With all communication media there are factors that influence how effective it is as a means to inform others. With conference calls the aspects that have the most influence over the effectiveness of such calls are the technical issues and human factors.

Technical Issues

Whilst the technical issues are less common than in the past, you still need to be aware of certain problems of a technical nature that can impact the effectiveness of your conference calls. Some will be under your control, such as replacing poor or old equipment, ensuring that all users are familiar with the equipment. Others are things you will have to work with as best you can, for example, lack of bandwidth.

What technology is used &	How people behave on the call	Impacts the effectiveness of conference calls
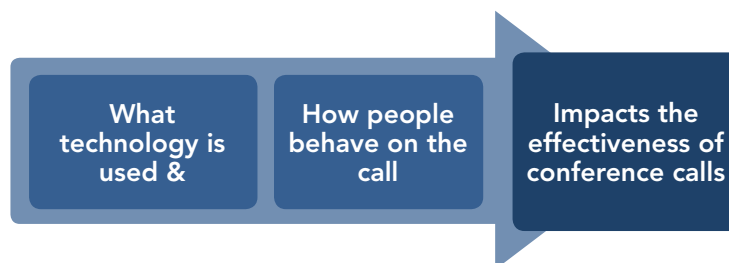
Other technical issues and possible ways of dealing with them to ensure your calls are an efficient use of your and others' time include the following:

Do not use a 'hold' facility—if you do this whilst on a teleconference you will force the participants left on the call to listen to the music your telephone system plays to those on hold. This is an unnecessary diversion and will quickly lose the attention of the other callers, resulting in a poorer contribution from them and ultimately a poor outcome from your call.

Avoid using cellular or cordless phones—these types of phones are prone to annoying static as they pick up background noise and sound like you're speaking in a tunnel. Both of these things will quickly result in callers losing concentration and the thread of the call.

This problem also applies to those who use speakerphones when teleconferencing, but these types of phone also have a further issue. Speakerphone users also lose the flexibility to speak and hear at the same time, which effectively 'clips off' parts of the conversation and often causes messages to be misunderstood, creating confusion.

Turn off 'call waiting'—anyone trying to reach you will cause your phone to beep to warn you of a call waiting, a sound that will be heard by everyone on the conference call. It is an unnecessary and irritating interruption that can be very disruptive to the flow of conversation.

DON'T	use 'hold' facility
AVOID	cellular or cordless phones
TURNOFF	'call waiting' facility
USE	Mute facility
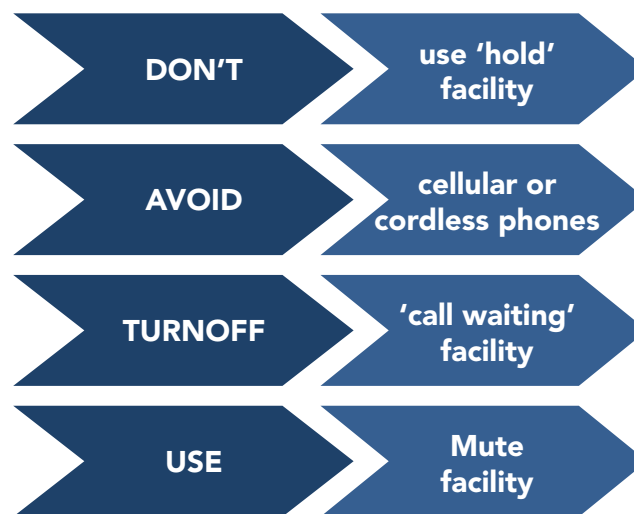
Use the mute facility—when you are dialing into a call from a room with multiple participants. If possible, it is best to use a polyphone or other technology as this enables everyone to hear and participate. Regardless of how many participants are on your end of the line, put your phone on mute when you are not speaking in the meeting so that everyone can focus on the main conversation and not interrupt unnecessarily.

As the underlying technology improves, many of the technical problems associated with conference calls and web-based communications are becoming less common.

Human Factor Issues

The other aspect that impacts the effectiveness of conference calls is the human element. This mainly relates to how you behave and your attitude during the call. As a manager your main influence on how others treat conference calls is by setting your own example. If you portray and talk of these calls in a positive manner, then others will adopt similar attitudes towards them.

As with all conversations, the behavior of others is greatly influenced by the physical presence of another and how they represent themselves. This does not exist in a teleconference call because each person is in their own environment and not in the formal setting of a meeting. Also, many of the visual indicators that temper how individuals behave together, such as facial expressions and body language, are lacking.

Human Factors:

Poor concentration

Loss of visual stimuli & feedback

Use of jargon & colloquial phrases
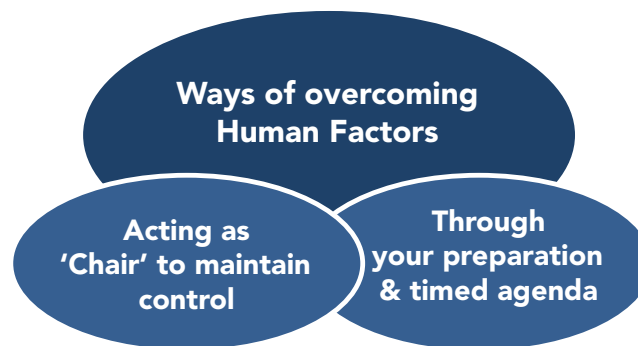
Lack of focus & preparation
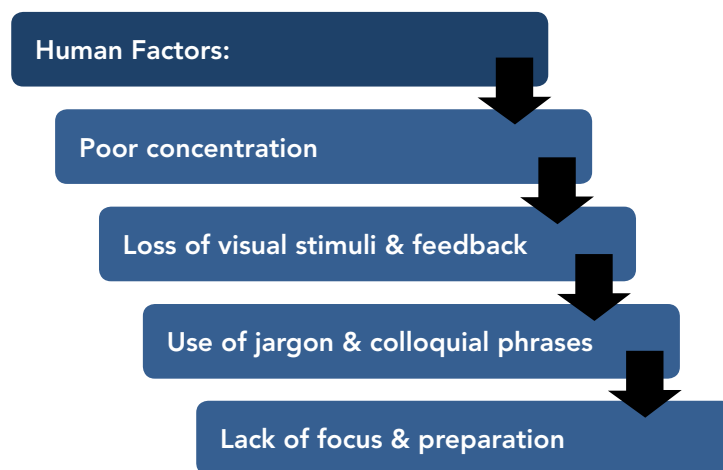
The normal behavior parameters everyone adopts in a meeting do not apply as some people will still be at home, others in the office, and others will be traveling. So each of these individuals will have distractions related to their location at the time of the call. One of the most common issues your calls will face is participants' loss of concentration.

This can occur at any time during the call and be caused by a local distraction or as a result of the person speaking wandering off topic or communicating their message poorly. It will be more difficult to identify this sort of behavior in a call because you are unable to see the individual's facial expressions or body posture, which would alert you to the fact that they were not paying attention.

You, as the person who requested the call, can minimize this sort of issue by acting in the same way as if you were chairing a meeting. You control and focus the discussions and draw individuals into the discussion as you need, whilst adhering to your own timed schedule (agenda).

One simple way to ensure that all those involved in the call have the opportunity to contribute is to list them all and if appropriate list names against topics. You can then quickly tick off each person as they speak on a topic and call on an individual if they haven't yet contributed despite you feeling that they have something to offer.

Ways of overcoming Human Factors

Acting as 'Chair' to maintain control

Through your preparation & timed agenda

Another human factor affecting the outcome of your calls is the language used by yourself and the others on the call. With many of the calls crossing international borders, use of slang expressions and colloquial phrases needs to be avoided; otherwise, the meaning of a contribution could be lost or misinterpreted.

In your role as 'call chair' you must ensure that any references to technical jargon or acronyms are known to all those involved; this is especially important if you are not aware of a caller's background or expertise. You may want to quickly qualify the meaning as part of your introduction to a discussion topic.

When you are involved in these types of calls you must be aware of the language you use and actively listen to feedback, ensuring that the message has been received and understood correctly. It is essential that you ensure that everyone has understood the messages being communicated so that they can fully contribute to each topic.

Preparation is the key to your conference calls being an effective communications tool and minimizing the disruptive aspects of the individuals involved. Before agreeing to attend a meeting you expect to know the length of the event, what it hopes to achieve,

and what items will be discussed so that you are aware of what you need to prepare to participate fully.

So why should this 'conference call,' *which is just a meeting using phones or other devices* rather than bringing participants to one location, be treated in a less professional or effective way? The answer is, it shouldn't be treated any differently. Prior to your call, use the technology to communicate your conference call agenda. This tells everyone involved in a clear and concise manner how long the call will last, what will be discussed, and the purpose of the call.
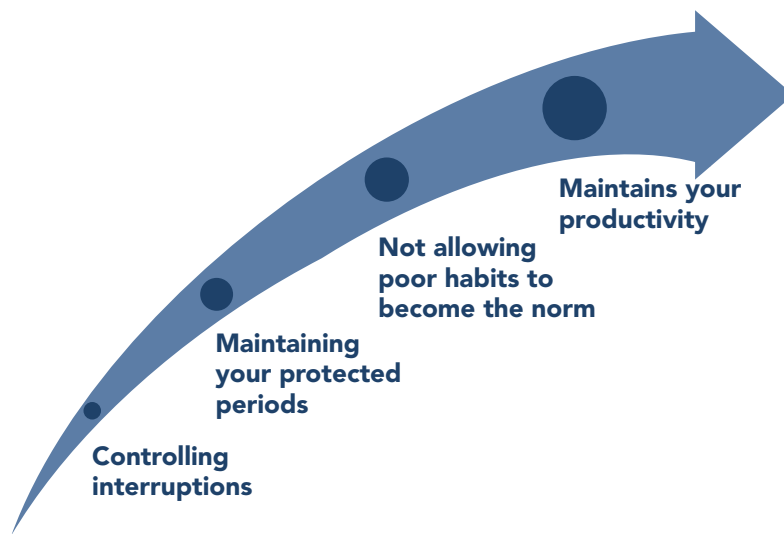
By setting the example that all conference calls must have a purpose and a time limit, and will be run along similar lines to a meeting you will reduce the number of unnecessary calls. Technology now ensures that you are available 24/7, so the temptation to call someone rather than think through a problem or make your own decision is extremely high.

This unwillingness to make decisions is based on the fear of what will happen if you get it wrong, both from a personal and an organizational perspective. As a manager you need to coach your team to use this technology wisely and effectively so that everyone benefits.

The actions you take after your calls will affect how productive your calls are viewed as being by others and yourself. As with a meeting, where you send out minutes, so with a call you communicate, via email or text, the findings and agreements reached during the conversation. This ensures that everyone understands the value of the call and its achievements.

Maintaining your Productivity

Whilst conference calls have undoubtedly brought substantial benefits to organizations by making personnel more productive and saving considerable sums previously spent on travel, they are not perfect as they can have a serious impact on an individual's productivity in a variety of ways explained below:

Maintains your
productivity

Not allowing
poor habits to
become the norm

Maintaining
your protected
periods

Controlling
interruptions

Controlling Interruptions

You must not allow conference calls to become a constant interruption to your work sched-ules. You have a responsibility to yourself to carefully consider whether a request to take part in a conference call is the best use of your time and what value you feel you can con-tribute. It is so easy to be diverted by the ringing of your phone or beeping of a PDA that you often forget to view this interruption in the same way you would a meeting request.

Such calls must be seen as a cost-effective and efficient use of people's time, both inter-nally and externally. Your organization and any others that you need to have conference calls with must be educated in how and when these calls are a good use of everyone's time and expertise.

You must do your best to ensure that all conference calls have a purpose and a time al-location, and that these are known prior to the call. All individuals asked to participate on a call should understand who the pivotal person of that call is and that their role is similar to that of 'chair.'

Protecting your Time

Your ability to ring-fence your time so that you can work undisturbed for a period of time is greatly impaired if you don't treat conference calls in the same way you do any other request for your time. If you have a secretary, you can let them know that you are unavail-able for conference calls during certain periods of the day and if you have to take calls at that time then another protected time must be assigned during your schedule.

For those who do not have secretaries, you may want to have a mutual agreement with a work colleague where you act as an interruption buffer for each other whilst you work undisturbed.

Adopting poor habits

Due to the nature of conference calls and the lack of visual feedback it is very easy for people to let their minds wander away from the topic, especially if the conversation is not being carefully managed as a chair would a meeting. This is compounded by the fact that you are in your own space, which can easily provide its own diversions, breaking into your concentration on the discussion taking place.

For example, if you are working in your own office or study at home you are likely to have your PC or MAC switched on so incoming mails are seen by you immediately. The temptation to open the item and read it whilst the conversation is going on is huge. Someone approaching you to sign off a document or slip a note under your nose is hard to ignore and will also break your concentration on the call.

You will have to be quite self-disciplined to control these types of distractions, as you may be the main instigator of them! Putting the lid down on your portable PC, moving away from the screen, and closing your office door will all help to focus your attention on the call. If you don't have your own office you may want to find a quiet area in which to take the call, reducing the number of interruptions.

Adapting your Communications Skills

The reason that most people prefer to meet others in person is because so much interpersonal communication depends on non-verbal cues. When you are in the same room as the other meeting participants it is very easy for you to see the extent to which others understand what you are saying.

You can also tell at a glance if others agree with you, need clarification, or have something of their own to contribute. These visual and physical clues are what you use to help you gauge an individual's response to what you have said or done. These clues form a key element in your initial judgment of any new person you meet, without which you will feel less able to make such an assessment and may be a reason you avoid conference calls.

This problem of real-time communication without accompanying visual cues is not new and dates back to the invention of the telephone. Even though cheap phone calls have been around for fifty years, they have never succeeded in entirely supplanting one-on-one meetings. This is because most people prefer to 'get to know' others face-to-face. This fact, plus anecdotal evidence, suggests most of us are not entirely happy to hold important discussions without the added input of non-verbal communication.

This suggests that by 'getting to know' someone first, you can then feel more confident in making inferences about their level of engagement, interest, and understanding from their voice alone. This is supported by the fact that most people feel as though it is more mentally demanding to hold a complex conversation with someone by telephone than it is to do so face-to-face.

Active Listening

By using this technique you can enhance your effectiveness during conference calls. By developing your skills of actively listening you will be able to compensate for the lack of visual feedback with an increased audio feedback. This is how you will ensure that you have picked up the true meaning of what someone has said. You will also retain a greater percentage of what is said during the call; no longer will you only remember about half of what was said.
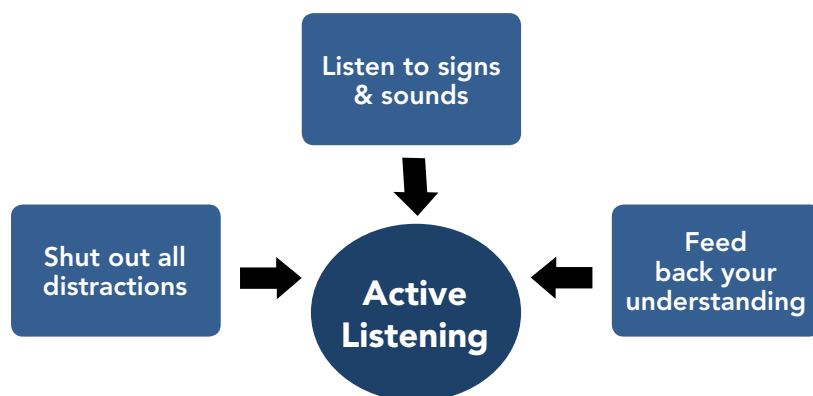
You can hearing examples of this during a telephone conversation when both parties check the other's understanding every few seconds by using a combination of verbal tics that encourage confirmation (like 'yeah?,' 'OK?,' 'You know what I mean?,' etc.). You will also hear them make use of slight pauses that allow the opportunity for interjection.
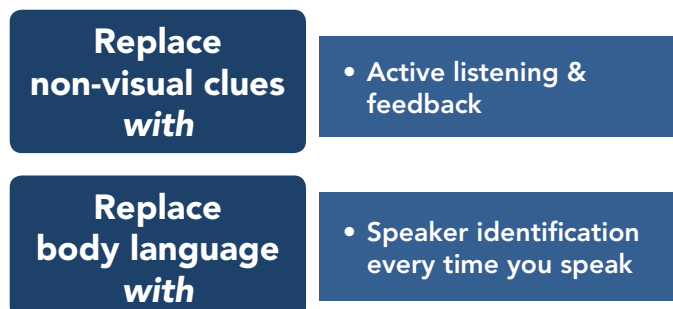
At the other end of the conversation you know the other person is likely to be making some verbal indication that they have heard your message, whether in agreement or not. This can take many forms, such as:

- 'mmmm,'
- 'Yeah,'
- 'Ok,'
- 'Right,'
- 'I see,' 'Really?' etc.

By making sure you incorporate your active listening skills into your teleconference calls you will ensure that you cut out pointless distractions and you will be able to make certain compensations for lack of visual feedback with your increased audio feedback. This enables you to improve your understanding and demonstrate this during the conversation.

Even when one person is dominating the conversation, what is happening is very much a two-way process with almost constant requests for feedback from the person talking. If you doubt this, then try saying nothing at all the next time someone is talking to you on the phone. After about ten seconds, there will usually be a short pause before they say something like 'Are you still there?' or they make it obvious that they do not feel as though you are paying attention.

The problem with conference calls is that they do not allow for this continuous feedback and the person doing the talking often feels uncomfortable, without being able to say why this is the case. This is particularly true when conference call attendees use the 'mute' facility on their phone. Whilst this does prevent distracting environmental noise, it leaves the presenter feeling as though they are speaking into a void.

Replace non-visual clues *with*	• Active listening & feedback
Replace body language *with*	• Speaker identification every time you speak

This lack of ongoing auditory feedback is very similar to VHF radio communication where the underlying technology only allows one party to speak at a time. In order to cope with this limitation, VHF radio operators are trained to communicate in a very formulaic way that can sound faintly ridiculous to outsiders.

This involves each participant in the conversation identifying themselves every time they speak, as well as keeping each statement as short and as straightforward as possible. Far from being an affectation, this protocol has been refined over many years to eliminate misunderstandings as much as possible.

Whilst no one would seriously suggest that conference calling needs to adopt protocols as strict as those used by VHF operators, there is a need to be aware that conference calls are more challenging than a normal phone call between two people.

In fact, conference calls are one of the most often cited pet hates of employees who find that their motivation to participate and provide ideas are shut down by the impersonal and difficult to coordinate nature of the medium.

KEY POINTS

✔ Conference calls are one of the most often cited pet hates of employees.

✔ The technical problems associated with conference calls and web-based presentations are becoming less common.

✔ Develop your active listening skills to help compensate for the lack of visual feedback.

✔ Despite improvements in technology, many employees find a lack of motivation to participate in and provide ideas during conference calls, as coordination is hard to emulate. The impersonal nature of conference calls is also an issue for some.

Making Conference Calls Work for You

Whilst you can use the best technology available for your conference calls, this is not the only way you can improve the efficiency and productivity of such calls.
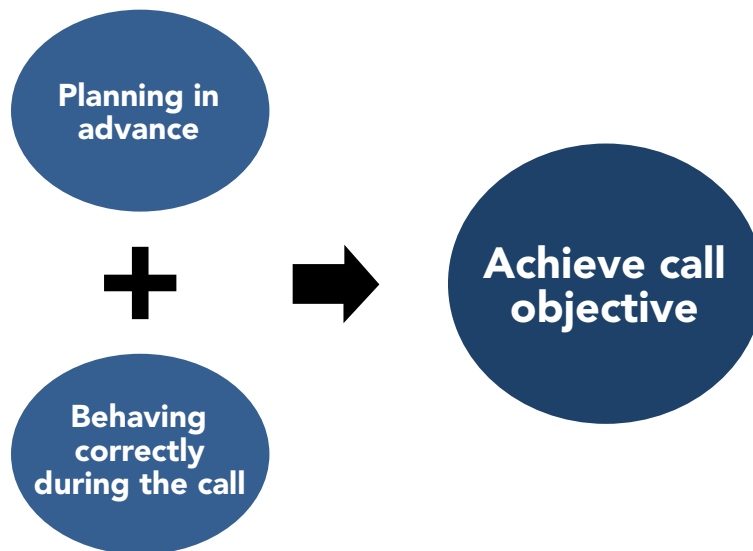
You can make your conference calls more effective by taking a constructive approach to how you plan for your calls and how you conduct yourself and interact with others.

Advance Planning

While your service provider will handle the technical aspects of the call, the real success of your teleconference is down to you. Planning and preparation is the key to success. There are several things that you should do when planning a conference call.

Conference Call Guidelines

- You should investigate whether or not your organization has such a document. These are extremely useful and every organization using this facility should have a set of published guidelines. They should cover both the technical aspects and the accepted etiquette of conference calls.

- If your organization does not have such a thing then you should think about producing something yourself, even if it is only for use within your own project. Your guidelines will set other callers' expectations of how they should behave and ex-

pect to be treated by other callers. It also coaches them to adopt the correct behavior during a call.

Call Guidelines

Select Call Options

Provide Sufficient Notice

Minimum Participants

Timed Agenda

Advanced Planning

Select Call Options

The technology provides you with a variety of options to choose from. Your final choice will depend on your objective for the call and the characteristics of the other callers. In this sense, you must tailor your conference call in a way that is most productive, with options such as the following:

- 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. It is important to remember that for some of the options you may need to reserve your choice with the service provider. You will have to ensure your selected time and date allows sufficient lead-time for this option to be booked in advance.

Provide Sufficient Notice

Make a list of all attendees and check that they're available 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 and to be properly prepared. Providing sufficient notice to those you want involved in the call greatly increases your likelihood of getting all those required to commit their time.

Then you can contact all participants giving them the date and time of the teleconference. Be mindful of time differences if it is an international call and factor this into the planning stage in order to ensure that people know the correct start time and that it is practical for everyone.

Always remember to specify the time zone so others are aware too and can quickly feed back to you if they have a problem. A simple way of avoiding any confusion is to list the different time zones of your participants so that you can quickly see reasonable times the call can effectively take place.

Keep Participants to a Minimum

A conference call with too many participants can be a frustrating experience for everyone involved. Experience suggests that calls with more than six or seven participants are too difficult to control and as a result frequently the objective is not achieved.

With this in mind, you must give careful consideration to how many people you want involved and ensure that the number you decide on is sufficient to achieve your objective.

You should also make it quite clear to your participants that you want their communications to be clear and concise so that the discussions are as effective as possible. It is useful to have this clearly stated in your organization's 'conference call guidelines.'

Create an Agenda

It is essential for you to retain control of the discussion as is the case with any type of gathering of minds, whether in a meeting or on a call. In the same way as you would in a meeting you retain control through an itemized and timed agenda for your teleconference.

Conference Call Agenda	
Contains necessary information for call	Specific time allocated for each item
Phone numbers & passwords	Discussion topics clearly identified
Access codes & any instructions required	List of all people on call with brief biography / Background data sent in advance

Your agenda will ensure that you know which topics are most vital to discuss so that the call runs smoothly and on time. It also keeps participants focused on the subject at hand and helps to stop them 'drifting off' during the discussion.

Your agenda should also include all the relevant phone numbers, passwords, and access codes, as well as clear instructions on how to dial in, even if this means stating the obvious.

You must send out any required handouts and supplementary material with sufficient time for participants to read them and prepare for the call. You should also ensure that each participant has a list of the other callers and their key information so that discussions are productive.

You should include such things as their full name and how they like to be 'known' (for example 'Jon' rather than 'Jonathon'), their job title, department, company, and their responsibilities regarding the current project.

For example:

- Jonathon Carlton - 'Jon'
- HR Manager
- Castleford IT Solutions LLC
- Responsible for supplying the UNIX database administrators and network support staff for project 'Isis.' (NOT application programmers—see Sarah Jones below).

In your short biography you can also state what someone is not responsible for if this is thought necessary to avoid confusion or misunderstanding. Remember, if a participant is confused about the names or the responsibilities of others then this will inhibit them from making a full contribution.

When people are unsure about something as basic as another's name or responsibilities then they are more likely to say nothing rather than ask for clarification. This is especially so if they feel that this is something that they are expected to know and if they are the only person who doesn't know.

You can choose to include such introductions at the beginning of the call, but this is often confusing and a distraction in conference calls. You will have to adapt your meeting skills to suit the requirements of conference calls if you want your calls to be effective.

You may feel it appropriate to include a timed item on your agenda for feedback and questions after each item. This prevents those on the call feeling they can't ask questions due to time pressure. It is always better to schedule time after each item rather than waiting until the end of the conference and then dealing with questions on every topic that was covered.

Remember that shorter calls of 30 minutes or so will be much more effective than lengthy calls, as the longer the call the greater opportunity there is for 'distractions' to occur and people to lose their focus. If the nature of your call means that it needs to be over 90 minutes long then it is best to schedule a ten-minute break so that people can refresh themselves. When everyone reconvenes after the break it is vital that you quickly review where you were before the break to bring everyone back up to speed.

Clarify What You Can Before the Call

If you need to explain something to other participants, then send an email and accompanying documentation to each of them individually. You can then check with them, again by email or text, whether they need any further clarification.

If necessary, you can call individuals to explain specific items to ensure everyone is discussing from the same level of knowledge. This is far better than trying to do this during the call itself where it will be more difficult because of the limitations mentioned earlier. It will also make those people who don't need clarification feel as though their time is being wasted.

Assign a Minute Taker

Although everyone in the office should take his or her own notes, someone should officially record the key findings of the discussion in formal minutes. As with your meetings, you will ensure everyone on the call receives these minutes once you have checked them. This ensures that everyone has the same perceptions of what was agreed on the call and any resulting actions.
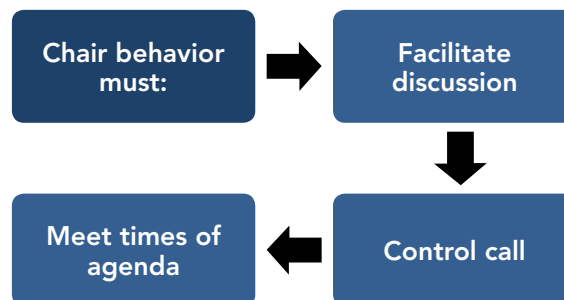
You may want to check if your teleconference service providers offer the opportunity to record the meeting into a voicemail system. If this service is offered the minute taker can use these recordings to listen again to anything they were unsure of at the time and to double check their notes' accuracy.

KEY POINTS

✔ Decide on the options you will use for your call and provide participants with sufficient notice.

✔ Create an agenda for your teleconference to ensure that you cover all the important topics.

✔ Include a detailed list of participants so that everyone is clear who is attending and what their responsibilities are.

✔ Send out handouts and supplementary material early so participants have time to read them and prepare for the meeting.

✔ Experience suggests that calls with more than six or seven participants are not usually very satisfactory.

✔ If you need to explain something to other participants, then send an email and accompanying documentation to each of them individually.

During the Call

Having laid a solid foundation for your call through careful preparation, your task now is to facilitate the call discussions to achieve your objective. Usually the person requesting the call performs the role of chair or facilitator to ensure the call is successful. When you are the requester you will need to ensure your behaviors portray the necessary characteristics of this role.

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┌──────────────────┐      ┌──────────────────┐
│  Chair behavior  │ ──▶  │   Facilitate     │
│      must:       │      │   discussion     │
└──────────────────┘      └──────────────────┘
                                   │
                                   ▼
┌──────────────────┐      ┌──────────────────┐
│  Meet times of   │ ◀──  │   Control call   │
│      agenda      │      │                  │
└──────────────────┘      └──────────────────┘
```

As Chair you will need to be assertive to maintain control of the call and use the agenda to manage the nature and length of discussion for each topic. By keeping control of the call's focus you will ensure clarity is maintained during conversations. Also, confusion is avoided by you regularly summing up what has been agreed as discussions progress.

It is essential that during the call you politely but firmly guide people back onto topic if they digress. You also need to make sure everyone has a fair opportunity to contribute and if you've not heard someone speak for a while try to draw them into the conversation because you know from your preparation that all participants have a valuable contribution to make.

Your expertise as a facilitator and chair will have a profound effect on the outcome of your conference call. There are several tasks you have to perform to ensure your call is a success:

- Start on time.
- Give a brief introduction.
- State the call objective.
- Stick to the agenda timings.
- Make a definite end to the call.

The first task is to start the call at the scheduled time and not to wait for latecomers. If you delay while waiting for one or two people you risk having your call high-jacked by another participant. Once this has happened it is an uphill struggle to regain control of the call and focus the conversation on your objective.
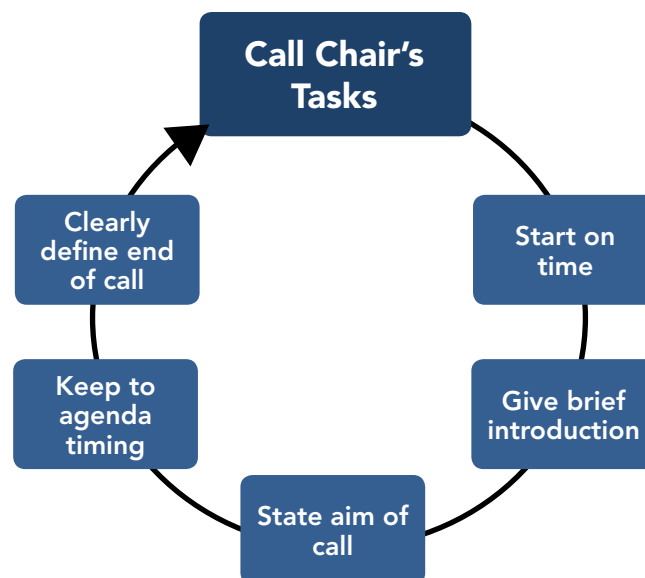
Your behavior needs to demonstrate that when you say your call starts at 10am it really does. Those who come into the call late will be conscious of their failure to act professionally and will make sure they are on the call from the start in the future as no one wants to look amateurish in front of their colleagues and customers.

Quickly recap who is involved in the call so that others can refer to your pre-meeting information for any further details they require. Then you will clearly state why you have requested the call and its objective. Explain how you want conversations to be conducted—for example, callers to identify themselves before they speak—and the timings for each topic as outlined in your agenda.

At the start of each agenda item you can ask who wishes to contribute so that you have a list of speakers. This gets around the lack of visual signs people can give the chair when they wish to speak in meetings whilst also providing you with a record of who has spoken and who has yet to contribute. This offers you the opportunity to encourage quieter participants to contribute. You can achieve this by asking a question or you can ask for their opinion on the subject being discussed.

Your control of the call is maintained through the medium of your agenda and you will need to strictly enforce the timings you have selected. This is especially important when you wish to close the call, as the end must be an obvious event and not come as a surprise to participants.

By keeping your eye on the clock you will be able to draw a timely end to your call. This is as important as starting on time because it informs everyone that you value their time and understand that they have other commitments they must meet as well as taking part in your call.

You will signal the end of the conference call by naming and asking each person on the call for any final questions or comments they have. If appropriate you may ask each caller to state the most important point made during the call. Finally, you will offer a brief summary of what was discussed and clarify any action participants need to take before formally thanking everyone for their contributions and ending the call.

Essential Tips for Success

There are three simple tips you can use on all your calls to ensure their success:

- Use a person's name whenever you are talking:
    - Yours as the speaker, and
    - The name of person you are addressing.
- Identify those asking questions by name.
- Always direct questions to an individual.

These three little actions will ensure that the lack of visual recognition in a conference call is replaced by verbal actions.

Address people by name **Give name of questioner** **Direct query to a named person**
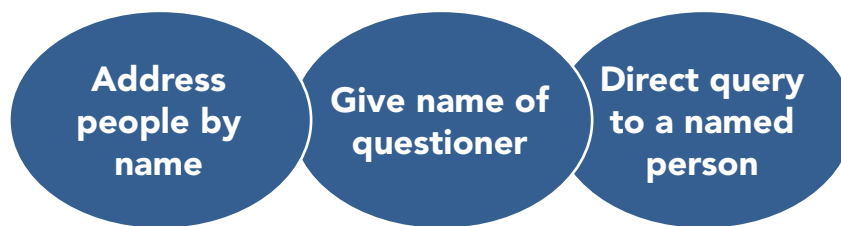
Using people's names when a question is asked or a remark is made enables everyone to know who has said what. This is important as accents may make several people, especially those from the same country or region, sound exactly the same, whereas by using names there is no confusion.

When people ask questions it is key that everyone knows who has asked the question so that they know how best to answer the questioner's concerns. By sending out a participants list it is easy for the person responding to the questions to glance down and see which department or organization the questions have come from.

In your capacity as chair you also need to ensure that when people ask a question they also request an answer from one of those taking part in the call. In some instances you may need to ask an individual to respond to the question. This guarantees everyone knows who has asked the question and who is going to reply. This procedure avoids awkward silences when no one answers the question and prevents the situation where several people try to answer the question at once, creating total chaos and mayhem.

KEY POINTS

✔ To make your conference call successful you need to act as a strong chair or facilitator.

✔ It is better for you to come across as slightly over-controlling rather than risk confusion about who is speaking next and what has been agreed up to that point.

✔ Begin on time, provide a brief introduction of who is on the call, and clearly state the call objective.

✔ Make sure everyone knows how you want them to behave on the call—for example, stating their name before they start to speak.

✔ Maintain progress in line with the agenda.

✔ Keep track of who is not contributing to the discussion and encourage them to do so.

✔ Go over what was discussed and clarify any action participants need to take before formally ending the call.

Conference Call Etiquette

There are four basic principles that if adopted by all those involved in the call will make the call a productive decision-making tool. They are:

- Do not use a 'hold' facility.
- Do not use a cellular or cordless phone.
- Do not use 'call waiting.'
- Use the mute facility.

The reasoning for each of these principles is quite simple. It is important that you avoid putting your phone on hold during a teleconference because if you do the other participants left on the call will have to listen to the phone system's music, which is an unnecessary and very irritating diversion.

Another irritating aspect of conference calls is the static interference others can hear from users of cellular and cordless phones. You also need to be aware that if you use

speakerphones on your calls you will effectively be 'clipping off' parts of the conversation as you cannot speak and hear at the same time.

You should also remember to turn off your call waiting facility whilst on your conference call. This prevents irritating beeps from being heard by other participants which are often blamed for breaking others' concentration. It also distracts you from what you're trying to achieve on the call as it interrupts your train of thought.

When you are dialing into a call from a room with multiple participants, utilize a poly-phone or other technology that allows everyone to hear and participate. No matter how many participants are on your end of the line, put your phone on mute when you are not speaking in the meeting to avoid unnecessary distractions and background noise.

Summary

The global nature of many modern organizations makes the use of conference calls instead of face-to-face meetings standard procedure for communication. Voice calls are often used for purely practical reasons, such as trying to save on time and money by keeping staff in the office or at home rather than traveling to meetings.

If your role includes dealing with international clients who you cannot easily and speedily meet face-to-face, then conference calls provide you with an efficient and focused means of communication and making decisions.

As the underlying technology improves, many of the technical problems associated with conference calls are becoming less common. However, the intrinsic limitations of the medium mean that most people still find it an uncomfortable way to communicate compared to a face-to-face meeting.

In order to overcome these limitations, every organization that uses conference calling should have a set of published guidelines that cover both the technical aspects and the accepted etiquette of conference calls. If your organization does not have such a thing then you should think about producing something yourself, even if it is only for use within your own project.

Preparation is the key to how successful your conference calls will be. The better you plan for the call by setting an agenda, providing a list of other participants and their roles and organizations, as well as sending out any background information, the better everyone involved can prepare. This enables each person to have the notes required and their own comments to hand when that agenda item is being discussed.

Other Free Resources

The Free Management eBooks website offers you over 100 free resources for your own professional development. Our eBooks, Checklists, and Templates are designed to help you with the management issues you face every day. They can be downloaded in PDF, Kindle, ePub, or Doc formats for use on your iPhone, iPad, laptop or desktop.

eBooks—Our free management eBooks cover everything from accounting principles to business strategy. Each one has been written to provide you with the practical skills you need to succeed as a management professional.

Templates—Most of the day-to-day management tasks you need to do have already been done by others many times in the past. Our management templates will save you from wasting your valuable time re-inventing the wheel.

Checklists—When you are working under pressure or doing a task for the first time, it is easy to overlook something or forget to ask a key question. These management checklists will help you to break down complex management tasks into small controllable steps.

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