

Understanding and Facilitating Conference Calls

Jacob Corvidae – for the Detroit Facilitation Guild – just a quick overview



Considering When to Use them

Good for:

- ⤴ Groups working together over a distance
- ⤴ Presentation format
- ⤴ One-way offering of concerns, observations, etc. from participants with a response from central committee or organizer, e.g. check-ins, focus-groups, etc.
- ⤴ Providing to access to people who can't easily get together physically
- ⤴ Anonymity
- ⤴ Specific check-in
- ⤴ Planning a project

Not good for:

- ⤴ Brainstorming or other spontaneous input formats
- ⤴ Active discussion
- ⤴ Reading body language
- ⤴ Emotional topics
- ⤴ Identifying who's talking

Understanding them

Challenges:

- ⤴ Distractions/multi-tasking - you lose people fast in a meeting, but you lose them faster on a conference call.
- ⤴ Not knowing who's talking
- ⤴ Not knowing when to talk
- ⤴ Multiple people talking at once doesn't really work.
- ⤴ Transparency - don't know when side conversations are happening via mute, email or text
- ⤴ Technical challenges, including:
 - ⤴ not everyone can easily access
 - ⤴ not everyone can see the same thing
 - ⤴ ambient noise issues
- ⤴ Tense subjects

(See other side)

Benefits:

- ⤴ Get participation from those who wouldn't otherwise make it
- ⤴ Save travel time
- ⤴ Almost no carbon footprint
- ⤴ Often can auto-record the meeting for reference

Considerations

All of the important requirements of preparing good meeting in any setting apply here, in regards to making sure that an agenda is planned, people know what the meeting is about, time expectations, outcomes, prepared presenters, etc. The tips below are specific to conference calls

PLANNING TIPS

1. Consider size of group, 3-6 or 3-8 is considered optimal.
2. Plan to accomplish less - don't overpack the agenda. ¹
3. Attention spans are shorter on the phone - keep it brief and focused ¹
4. Consider designating special roles: "greeter" and "tech person" ¹
5. Plan for document repository via web, email, etc. for review during meeting ¹
e.g. use Google docs for agenda and notes which others can view while written
6. Consider other tech tools to help, but also have back-up plan in case they don't. ¹
7. Consider and clarify time-zones as needed ¹
8. Don't assume can't do other meeting practices. Breaks, break-out sessions, fishbowls etc. are beneficial here as well ¹
9. If only some folks are on the phone --- put a sign with their name and/or picture up to help folks remember that someone else is there, and who that is ²
10. Involve individuals beforehand to ensure engagement.
11. Obtain a list of names of who will be participating on the call ahead of time
12. Making separate calls to people ahead of the meeting; Check-in with individuals before-hand
13. Provide an agenda at least a day before
14. Let people know what to think about ahead of time, e.g. a list of specific questions
15. Let people know what you want from them ahead of time - affirm that everyone makes a unique and valuable contribution
16. Give a snap-shot of presentation
17. Provide examples ahead of time, while encourage brainstorming and asking people not to limit their thinking to the ideas in the examples
18. Pre-thinking, consider what topics can be moved to email
19. Set-up a googledoc to encourage brainstorming ahead of the call
20. Set-up clear outcomes of the call; share a checklist of goals
21. Provide an overview of what has already been accomplished
22. Confirmations: When reminders sent out, include conference phone number and PIN

e.g. assign specific topics to people ahead of time, and/or conduct 1-on-1 checkins with each individual ahead of time.

DURING MEETING:

1. Actively checking for input/speakers on each topic
2. Be sure to use your name and others names directly, since it's hard to identify who's talking who you need to hear from. ²
3. Create a sequence for specific responses as opposed to the general "any comments?" as these have a built-in discouragement on the phone. ²
4. Facilitate very actively – is more necessary on phone calls to keep attention and progress.
5. In the first five minutes, facilitator acknowledging when the call will be starting

6. At the start of the call, check-in's: ask, "Are you someplace where you can be on a call?"
7. Roll call
8. To support focus, and underline areas of consensus, continuously summarize what you think you are hearing, e.g. "Is this what I'm hearing?" – Can't wait for people to voice a decision.
9. If using a googledoc to record meeting minutes, set-up a "live" note-taker – call attendees can see notes as they are entered
10. If something emerges during a call, for example, a decision that needs to be handled off-line, allow people to focus on the relevant issues and get done what needs to get done.
11. Allow a call to end early when conflict arises (for example, if a decision is needed to move forward but there is not sufficient information to make a decision).
12. When some attendees in room, some not, consider a Round Robin approach (e.g. a three word response) or have the facilitator call on people to allow everyone airtime
13. "Check-outs" – what are people taking away from the call.

ROLES

1. Facilitator
2. Technology Person
3. Note-taker

TOOLS

1. Free Conference Lines
2. Googledocs

Resources

(referenced as notes - also contain additional information)

Free Conference Lines

Freeconference.com

- Free
- Easy to create call line and PIN
- Can automatically send out reminders ahead of call
- Audio only

Gotomeeting.com

- Fee for service
- Includes webcam (video) option
- Allows for collaborative process through viewing of the same screen – can view documents of presenter
- Webinar option

Skype

- Free in US
- Less expensive option for international callers
- Includes video option

1 Telephone Conference Call Tips

from Washington State

[http://wiki.sos.wa.gov/PeerLearning/\(S\(ov42d0n5mb4u2k2sfqebptz1\)\)/Default.aspx?Page=Telephone-Conference-Call-Facilitation-Tips&NS=&AspxAutoDetectCookieSupport=1](http://wiki.sos.wa.gov/PeerLearning/(S(ov42d0n5mb4u2k2sfqebptz1))/Default.aspx?Page=Telephone-Conference-Call-Facilitation-Tips&NS=&AspxAutoDetectCookieSupport=1)

2 Proven Practical Tips for Effective Conference Calls

http://www.gilgordon.com/downloads/conf_call.txt