

TIPS FOR CONFERENCE CALL & TELECONFERENCE SUCCESS



Understanding the technical equipment is perhaps too much to hope for - - but knowing what to do if something goes wrong is essential. On a conference call, participants should be told what to do if they are disconnected from the call. They need to know what number to call, what call to reference when they reach the operator and that they should announce their presence on the call again. Using a conference phone makes such calls easier but it is not essential. During a teleconference, each site should know who to contact if there are technical difficulties.

An increasing number of phone systems will allow individuals to do conference calling up to a certain number of participants without going through an operator. When this is not possible, the initiating party should contact the conference operator (usually long distance) with the time and date for the call, a list of the participants by name and telephone number. The conference operator will usually do the rest. Be certain that the participants provide you with the number at which they wish to be reached for the call – it isn't always their usual number. Or you may be lucky enough to set a conference call where each individual calls an access number and enters a code and is connected. Just be certain before the call to inform everyone of the process.

1. Before making the final arrangements be certain to clarify time zones and location (phone number or other specific information essential for the "connection").
2. Send a list of participants and a specific, detailed agenda in advance.
3. Begin on time. Communicate the time the meeting will end & aim for ending early.
4. Establish ground rules:
 - speakers should identify themselves by name when they speak
 - speak clearly and directly into phone or microphone
 - do not attempt to interrupt or "talk over" another speaker
 - everyone has responsibility to participate
5. Clearly designate the person who will chair the meeting and with gathered sites who will speak for the group when needed.
6. Take time for "verbal handshake" – have individuals introduce themselves or do a roll call asking each to respond & say something specific such as telling us "how's the weather where you are" (that keeps the responses short!).
2. Define the purpose of the meeting and expected outcomes.
3. Stay on schedule!
4. When referring to printed material available to participants, give time to locate it or take time initially to have people place the paperwork in order based upon the agenda.
5. Before the meeting ends, the leader should summarize the decisions, results, action plan, assignments, if any, and poll participants for final comments.
6. If necessary, make arrangements for next meeting.
7. Thank everyone for participating.
8. Terminate the call.



Such virtual meetings can be very effective if managed well. Limit the meeting to no more than 90 minutes – the shorter the better, but allow enough time for appropriate discussion and decision-making.