

## Tips For Conference Calls

1. Each call should have a moderator or facilitator. Moderator or facilitator should sign on at least 10 minutes before the beginning of the call.
2. Each call should have a note-taker that is not the facilitator. This should be decided ahead of time so the person is able to prepare.
3. As each person joins the call, the moderator should ask them to identify themselves. All participants should mute their phone when they are not speaking in order to eliminate distracting background noise.
4. When conference calls are small enough (less than 10 people) moderator should recap for the participants who are already on the call as each person joins. For example:
  - a. (BING) Moderator: Good morning, who joined us? Participant: This is Mary Smith from Head Start. Moderator: Hi Mary, this is Anna Thompson. We have Sam, Joe and Alice here as well.
5. As new participants join the call, the Moderator should stop and be sure they identify themselves. While this may feel like an interruption to the meeting, participants should be clear on who is in the “room.”
6. Each call should have an agenda. It is helpful for the agenda to have amount of time to discuss each item to assist participants in staying on track. Items that need to be voted on or decided should be marked.
7. If items are brought up that are not on the agenda, consider adding them to the bottom of the list. It is very easy to get sidetracked on conference calls.
8. There is no opportunity for visual cues, so participants must remain silent while others are talking. If a participant would like to ask a question or request feedback, it is important to give extra silent time for other members to come off mute to respond.
9. If the facilitator is interested in receiving feedback, it is important to use participants’ names. This is to ensure participation, not put participants on the spot. Participants should be prepared for these types of prompts. For example:
  - a. Moderator: We need to decide on a name for our team. Sam, have you thought of anything? (pause) Sam: I have not. (pause) Moderator: Joe, have you thought of anything? (pause) Joe: I did not. (pause) Moderator: Sam or Alice, what about you? (pause) Sam: I got nothing. (long pause) Alice: I like Tigers. (pause)

10. Facilitators need to become comfortable with framing questions so that silence can indicate consent. For example:
  - a. (continued from example 7) Moderator: Tigers is the only suggestion we have received and I think that is fine. Does anyone have any objections to Tigers? (long pause) Then Tigers it is, thanks Alice!
11. Facilitators need to become comfortable with the number three. Sometimes it is difficult to get participants to talk so trying to get three suggestions for something can prompt discussion. Other times, it is difficult to get participants to stick to task or scale back. Limiting suggestions for something to three can keep the agenda moving. For example:
  - a. (quiet participants) Moderator: We need to decide when our next meeting is. I'd like to take three suggestions and then make a decision. (pause). Joe: How about Thursday the 3<sup>rd</sup>. (long pause) Alice: How about Tuesday the 2<sup>nd</sup>. (long pause). Moderator: That is two suggestions, does anyone have a third? (pause). Sam: Either of those is fine with me. Moderator: Great, let's take a vote.
12. Moderators need to be willing to decide who goes next. Participants need to be willing to take suggestion on the order. For example:
  - a. (zealous participants) Moderator: We need to decide when our next meeting is. I'd like to take three suggestions and then make a decision (pause) (Joe, Sam and Alice start talking at the same time) Moderator: I can hear at least two voices – let's go with Joe and then Alice. Joe: How about Thursday the 3<sup>rd</sup> or Monday the 7<sup>th</sup>. (pause) Alice: How about Tuesday the 2<sup>nd</sup>. Sam: How about Monday the 1<sup>st</sup>. Moderator: We have to keep it to three so I heard the 3<sup>rd</sup>, 7<sup>th</sup> or 2<sup>nd</sup>. Let's take it to a vote.
13. Moderators need to be comfortable taking a vote in a role-type fashion. They also need to be able to keep track of the results. For example:
  - a. Moderator: We are voting on our next meeting date. The choices are the 3<sup>rd</sup>, 7<sup>th</sup> or 2<sup>nd</sup>. Joe? Joe: 3<sup>rd</sup>. Moderator: Alice? Alice: 2<sup>nd</sup>. Moderator: Sam? Sam: Either. Moderator: Mary? Mary: 3<sup>rd</sup>. Moderator: Alright, the most people can attend on the 3<sup>rd</sup> so that is our next meeting date. Does anyone have any objections? (pause)
14. Try not to interrupt others. It is important to listen carefully and leave extra long pauses to ensure that everyone has a chance to jump into the conversation when necessary.

15. Bring your patience and your sense of humor. Conference calls are different than face to face meetings. While they may not be perfect, they do enable participation from a distance and eliminate costly travel. Try to see the benefits to the conference call and work together to make it time used effectively.