

# Facilitating Teleconferences

## Before the teleconference:

- Contact participants by phone or e-mail to seek their input to the agenda.
- Create a detailed agenda with process notes that identifies the various types of conversations that will be held (information sharing, planning, problem solving, relationship building).
- Identify who needs to be involved and for which segments of the call, plus the information that each player needs to prepare.
- Distribute the agenda to the participants so they can do their homework and dial in to the call at the time they'll be needed.

## At the start of the teleconference:

- Conduct a roll call to establish that people are engaged and ready to proceed. If applicable, ask each person to state what they need to get out of the meeting. Record these personal goals and refer to them throughout the meeting to help keep people engaged and let them know you have them in mind.
- Create a name map on a blank sheet of paper in front of you. Beside each name, write down their stated goal for the session. As the meeting progresses, make a check mark beside people's names every time they speak. This will remind you of who is on the line and what they need to get from the session. It will also help you identify the people who need to be brought into the conversation.
- Review the agenda to clarify the overall purpose of the call, the purpose and process for individual segments and time associated with each segment. Also be clear about who needs to be part of which conversations.
- Clarify the rules of teleconferencing. This can be a facilitated conversation, or you can propose a core set of teleconference norms that participants can amend and ratify.

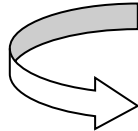
### Teleconference Norms

To ensure that this call is productive we will all:

- be as clear and concise as possible
- try to engage others by asking questions and offering our opinions
- ask for clarification if it's needed
- freely express concerns and opinions
- speak up if we notice we've been silent for too long or if a particular conversation needs to wrap up
- strive to stay focused
- ask for a summary anytime we need to get refocused
- announce if we are leaving the call

### **During the teleconference:**

- At the start of each topic, review the purpose, process and time frame for each item.
- Call on people by name, both to present and to comment on what others have said. Keep track of who is getting air time.
- Periodically make process checks to insure that things are still on track:



#### **Teleconference Process Checking**

- Is the purpose still clear?
- Is our approach working?
- Are we making progress?
- Is the pace ok?.. fast?.. slow?
- Have we lost anyone?

- To bring closure to a topic, offer a summary of the key points that were made. If it was a decision-making discussion, turn the summary into a decision statement, then conduct a roll call of each person to ask them to accept the final decision.
- Help the group create action plans for any topics that need them. Encourage people to take responsibility for follow-through.

### **At the end of the teleconference:**

- Review the summaries for each topic and the action steps that have been identified.
- Invite each person to say whether their goal for the meeting has been achieved or to make a statement of what they feel they got out of the meeting.
- Conduct a brief post-telecon evaluation by asking people to identify what worked, didn't work and ideas to improve future telecons. If this is impractical, create an evaluation form on-line and deploy it through e-mail.
- Share details about when and how the minutes will be shared.
- Identify any future teleconferences.
- Express thanks for everyone's participation and sign off.