



Teleconference Tips for Meeting Leaders

These tips are provided to help lead and facilitate phone meetings that are focused and productive.

Step 1. Meeting Planning and Agenda. To plan an effective meeting, the desired meeting outcomes and objectives should be determined by the Meeting Leader (ML) and/or planning team. Once outcomes and objectives are identified, an agenda can be created. When the date and time of the meeting has been set and the conference call phone number has been reserved, the ML should:

- Send the meeting agenda, meeting outcomes and objectives, participant list, and conference call phone number at least two (2) days prior to the meeting to all meeting participants;
- Send additional materials or documents in advance tied to specific agenda items and;
- If appropriate, arrange for someone to take notes during the meeting.

Step 2. The Day of the Call. The ML should call in at least five (5) minutes in advance of the scheduled time of the conference call to be available when other participants to call in.

Step 3. Start the Meeting on Time. Unless a key participant is not present, do not wait for all the participants to call in before starting the meeting. Start the meeting on time and if a participant calls in later, the ML can *briefly* inform the participant what topic is being discussed.

Step 4.

Meeting Start-up Procedures.

- Introductions: As participants call in, the ML introduces him/herself and asks the caller to introduce themselves to everyone.
- Participant List: The ML checks each name on the participant list to track during the call. (The list of names will be useful when doing a “round robin” process – wherein the ML calls on everyone to request their input on a specific topic or issue.)
- Once all the participants have all called in, welcome everyone to the call and thank everyone for their participation.
- Review the meeting agenda (ask if there are any additions to the agenda,) meeting outcomes, and ground rules (Teleconference Ground Rules listed below.)
- State the time when the meeting will end and confirm that you plan to stay on schedule.

Step 5. Explain the Teleconference Ground Rules.

- One person talks at a time.
- Speakers should continually identify themselves by name when making a comment or asking a question.
- Everyone is invited to participate. The ML may choose to use a “Round Robin” on some topics using the participant list and call on everyone.
- Remind everyone to make sure their information is relevant to majority. If a discussion gets too detailed, the ML may ask that the topic be placed in the “Parking Lot” for follow up after the call. (A Parking Lot is merely a list of topics captured for review at a later time.)
- Define acronyms and explain key meeting points. If someone is taking meeting notes, throughout the meeting, ask if he/she needs anything repeated or clarified. Taking notes is a challenging task, so make an effort to be patient and supportive of the person taking notes.
- Avoid background noise near your microphone (shuffling papers, tapping pens, no eating, smacking lips, etc.) Participants may want to mute their phone when they are not speaking.
- Enunciate for clarity and project your voice.

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Step 6. Start with the First Agenda Item.

- The ML (or appropriate participant) introduces each agenda item. Depending upon the topic, for example, one specific person may need to give background information and then the ML will open it up for discussion and decisions.
- The ML should ask, “Are there any issues discussed that should be placed in the Parking Lot for review after the meeting?” If yes, write down those topics or issues.
- Before moving on to next topic, the ML should ask, “Is there anyone else who would like to comment?”.
- Regarding identified action items, the ML may ask for volunteers and assign any action items after the discussion is complete.
- During the call, the ML will keep the meeting on track by referring back to the agenda topics.

Step 7. 20 to 25 minutes Before Meeting Adjourns.

- ML asks if there is other business to discuss. Determine how much time is available to discuss these topics or issues.
- Read the “Parking Lot” list of items. Determine what needs further discussion and assign appropriate deadlines.
- The ML asks group if they want to extend the meeting a few minutes if it is necessary.

Step 8. 5 - 10 minutes Before Meeting Adjourns.

- The ML states and/or asks: What are our next steps? Determine action items.
- Where appropriate, the ML might ask, “Are any sub-committees necessary?” If yes, encourage interested participants to contact one another after the meeting is over.
- If another meeting is required, the ML should determine who will set up the next meeting and assign that task to that person.
- **Periodically for ongoing meetings: Meeting Review:** If time allows, the ML should do a quick process check: What worked about this meeting? What could be better?
- **Make it a priority to end the meeting on time. This builds meeting/leadership trust.**

Step 9. Ending the call. Thank everyone who participated during the call. Stay on the line until everyone has hung up. Then end the call on your conference phone.

Step 10. After the Meeting. The ML will send out follow-up emails to participants regarding action items and if there are meeting notes, make sure they are edited and distributed in a timely manner to the participants.

General Information:

Note Taker: Prior to the meeting, the ML may ask for someone to take notes on action items, key points and decisions in the meeting. The ML should periodically ask the person taking notes if they have any questions or need any clarification of information.

Late Participants: If participants call in late, the ML should ask who just phoned in, and briefly mention the current agenda topic title, and continue with the meeting. The ML does **not** take too much the time to orient each late person to the agenda topics and what has been discussed unless the late person is key to the meeting’s agenda and outcomes.

Facilitator: For large or complex meetings, the ML may request that a Meeting Facilitator assist in planning and running of the meeting. The CDFW, Office of Training and Development may be able to provide facilitation services or refer you to other facilitation resources. Please contact OTD at (916) 928-8330.

