KEY PHRASES FOR LEADING CONFCALLS

A book from the series *Effective Communication* by

ecsplicite
Language **training** by phone

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1. PREPARATION

- As a manager, you may be called upon to lead the occasional (*or perhaps frequent*) conference call.
- While these conference calls will never fully replace the need for face-to-face meetings, they are a necessary tool for communication and decision making.
- Preparation is the key to managing any productive meeting, but thorough preparation is vital to the success of any conference call
- The road to preparation begins with the agenda
- In addition to ensuring the very quality and structure of the agenda itself, the conference call leader must also have it ready in sufficient time for advance distribution
- Enough time must be set aside to put the agenda online, or to fax or e-mail copies to all meeting participants well in advance of the meeting start time
- To ensure full participation and attendance, your agenda should include all vital statistics about the call:
  - ➢ Date
  - ➢ Start Time (*and don't forget different time zones*)
  - ➢ End Time
  - ➢ Dial-in numbers and any pass codes Name and Phone Number of the Meeting Coordinator
- You can almost guarantee that your call will get off on the wrong foot if participants lack the correct information to join the meeting.
- As you prepare to plan and lead your conference call, remember the impact that physical location can have upon the call dynamics

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2. SET THE ETIQUETTE

- As the leader of a conference call, it is your obligation to ensure that all participants are aware of the expected conference call etiquette
- By creating ground rules for call participation, you can achieve a more productive, courteous and timely meeting.
- You should establish the following etiquette guidelines for conference call participants:
  - ➢ Call in on time, and announce yourself as you join.
  - ➢ Do not interrupt the call if you are late, wait for a break and then announce yourself.
  - ➢ No cell phones or music on hold.
  - ➢ Take the call in a quiet place, and put your phone on mute to block any noise when you are not speaking.
  - ➢ State your name before speaking.
  - ➢ Be prepared for the meeting with copies of the agenda and any other relevant materials.
  - ➢ Be courteous to other participants, do not talk over the voices of others and be mindful of meeting timelines.
  - ➢ Make your comments and questions brief, relevant, and to the point.

3. KEYS TO A SUCCESSFUL CONFERENCE CALL

- Maintain control and momentum
- Establish control at the very start by reviewing the agenda, and then stick to it
- Introduce yourself as the leader, and allow all other participants to announce themselves
- Enforce the rules of your conference call etiquette
- Always start the call on time, and conduct a roll call
- Do not interrupt the discussion for anyone who joins in late
- Wait until there is a logical break point before allowing late arrivals to introduce themselves and to officially join the meeting.
- The success of a conference call will largely depend upon the structure and purpose of the meeting, and your ability to manage the flow
- Keep a conference call moving along the right path - the key to this strategy (*especially when lacking visual clues)* is to know your participants and to listen attentively
- It is dangerous to assume that silence equals agreement or understanding.
- You must actively ask for feedback, not from the group, but from the individuals involved
- As the call leader, it is your job to directly request feedback, structuring the call so that all voices can be heard, polling participants as needed, and challenging others to stimulate further discussion
- When there are no visual clues, the leader must be able to sense disinterest or intimidation, and continually press forward for increased participation
- As the call leader, you need to take note of key questions and comments, and repeat them as needed for the benefit of all participants

4. PRE-CONFCALL CONTACTS

4.1. Pre-Conference Telephone Calls

- I'm calling to ask if you'd be available on... (*Day/date/time*)
- I'd like you to be available for a conference call on... *(Day/date/time)*
- I'm scheduling a meeting on... *(Day/date/time).* Can you attend?
- I'm inviting you to attend a meeting on...
- I'm requesting you to attend...
- Could you please confirm that you can attend...?
- Before the conference call next week I'd appreciate it if you could think about...
- The main purpose/subject of the conference call is...
- I'm sending you by email our *(provisional/draft)* agenda
- Please confirm that you've received your copy of the agenda
- If there's anything you think should be added please let me know
- Feel free to make any comments on the agenda
- I'd appreciate your suggestions for any additions to the agenda

4.2. Pre-Conference Announcement Email/Fax/Letter/Memo

- It is prudent to send a written announcement/notification of a Conference Call
- This document should include the following information:
  - ➢ Time and date of the Conference Call
  - ➢ Location *(if applicable)*
  - ➢ The draft Agenda
  - ➢ A list of expected participants
  - ➢ An explanation of the purpose of the Conference Call
  - ➢ What participants should prepare

4.3. Confirmation/Reminder Email/Fax/Letter/Memo

- An Email/Fax/Letter/Memo should be sent confirming details and with final agenda at least one day before the Conference Call
- An Email/Fax/Letter/Memo reminding participants of the details as close to the meeting as possible is also wise

5. THE CONFCALL

5.1. Opening the Concall

- Good morning/afternoon, everyone.
- Good morning/afternoon, everyone. I'd just like to take a roll call before we start
- If we are all here, let's - get started / start the meeting / start.
- Now that we're all connected /signed in, let's begin
- I think we're all here now – so let's begin by taking a roll call
- If you don't mind we'll start the session now with a roll call
- Hello everyone, I think we are ready to begin
- I think we're all present now, let's just check *(-read participant's names)*
- Present – That's me – Here – Yes, I'm here

5.2. Welcoming and Introducing

- Please join me in welcoming (*name of participant*)
- We're pleased to welcome (*name of participant*)
- I'd like to extend a warm welcome to (*name of participant*)
- It's a pleasure to welcome (*name of participant*)
- I'd like to introduce (*name of participant*)
- This is (*name of participant*) – if you'd like to introduce yourself...
- (*Name of participant*) is new to our group. He'd like to say a few words of introduction

5.3. Stating the Principal Objectives

- We're here today to ...
- I'd like to make sure that we ...
- Our main aim today is to ...
- I've called this meeting in order to ...
- This is the first meeting of the (*group/project*)
- The purpose of this meeting is to...
- The objective of today's meeting is...

5.4. Giving Apologies for someone who is absent

- I'm afraid that (*name of participant*) can't be with us today. S/he is ...
- Unfortunately, (*name of participant*) ... will not be with us to day because s/he ...
- I have received apologies for absence from (*name of participant*), who is in (*place*).
- I'm afraid it looks like (*participant names*) are not joining us...
- It seems that (*name of participant*) is not present today
- (*Name of participant*) appears to be absent
- (*Participant name/s*) are not with us but we need to carry on without them

5.5. Reading the Minutes (notes) of the Last Meeting

- To begin with I'd like to quickly go through the minutes of our last meeting.
- First, let's go over the report from the last meeting, which was held on (*date*)
- Here are the minutes from our last meeting, which was on (*date*)
- As this is our first meeting and there are no minutes, let's go straight to the first point on the agenda

5.6. Dealing with Recent Developments

- *Paul*, can you tell us how the XYZ project is progressing?
- *David*, how is the ABC project coming along?
- *Simone,* could you update us on...?
- *Daniel*, can you tell us where we stand on that...?
- *Elise*, have you completed the report on the new accounting package?
- Has everyone received a copy of the report on current marketing trends?
- Could you give us a status report on...?
- Please bring us up to date on...
- What have been the developments regarding...?
- How is that issue developing/progressing?
- What's the latest news on...?
- Where are we on...?

5.7. Moving Forward

- So, if there is nothing else we need to discuss, let's move on to today's agenda.
- Shall we get down to business?
- Is there Any Other Business?
- If there are no further developments, I'd like to move on to today's topic.
- Let's move on to today's business
- Let's continue to the agenda

5.8. Introducing the Agenda

- Have you all received a copy of the agenda?
- Has everybody got a copy of the agenda?
- There are X items on the agenda. First, ... second, ... third, ... lastly, ...
- Shall we take the points in this order?
- If you don't mind, I'd like to go in this order today.
- Let's skip item 1 and move on to item 3
- I suggest we take item 2 last.

5.9. Allocating Roles (minute taker, participants)

- (*Name of participant*) has agreed to take the minutes.
- (*Name of participant*), would you mind taking the minutes?
- (*Name of participant*) has kindly agreed to give us a report on ...
- (*Name of participant*) will take point 1, (*name of participant*) point 2, and (*name of participant*) will lead point 3.
- (*Name of participant*), would you mind taking notes today?
- The minute taker should note any decisions made and by whom, the action to be taken and by whom and by when

5.10. Agreeing on the Ground Rules (contributions, timing, decision-making, etc.)

- We will first hear a short report on each point, followed by a discussion of ...
- I'd just like to remind you of the etiquette for this conference call
- I suggest we go round the table first, starting with....
- Let's make sure we finish by ...
- I'd suggest we ...
- There will be five minutes for each item.
- We'll have to keep each item to 15 minutes. Otherwise we'll never get through.

5.11. Introducing the First Item on the Agenda

- So, let's start with ...
- I suggest we start with...
- Why don't we start with...?
- Let's begin with...
- Let's begin by...
- Let's look at...
- It's time to look at the first item on the agenda
- So, the first item on the agenda is
- *Paul*, would you like to kick off?
- Shall we start with *Jeanne?*
- So, (*name of participant*), would you like to introduce the first item?

5.12. Closing an Item

- I think that takes care of the first item.
- Shall we leave that item?
- I think we should close this point and...
- Right, I think we've covered that...
- Okay, I think we've all had our say on that...
- That covers that point
- Let's finish there

5.13. Next Item

- Let's move onto the next item, which is ...
- Now that we've discussed X, let's now ...
- The next item on today's agenda is...
- Why don't we move on to...?
- Right, let's move to item...
- If nobody has anything else to add, lets continue to ...
- Now we come to the question of.
- Next *David* will update us on...
- Next we need to consider...

5.14. Giving Control to the Next Participant

- I'd like to hand over to (*name of participant*), who is going to introduce the next point.
- Next, (*name of participant*) is going to take us through ...
- Now, I'd like to introduce (*name of participant*) who is going to ...
- We haven't heard from you for a while *David* – would you like to comment here?
- I believe *Elise* may have something to add at this point
- What do feel about that last comment/point *Paul*?
- I'd like now to ask (*name of participant*) to say a few words
- Over to you (*name of participant*)
- Any comments (*name of participant*)?

5.15. Summarising

- Before we close today's meeting, let me just summarise the main points.
- Let me quickly go over today's main points.
- To sum up...
- Okay, why don't we quickly summarise what we've done today?
- In brief, ...
- Shall I go over the main points?
- Let's recap...
- So it's seems we've decided
- We appear to have reached agreement on the following...
- We've agreed that...

5.16. Finishing Up

- Right, it looks as though we've covered the main items.
- If there are no other comments, I'd like to wrap this meeting up.
- We're running out of time, let's wrap it up for today
- Time's up, let's close the meeting
- Let's bring this meeting to a close for today.
- If there isn't Any Other Business, let's conclude
- Is there anything else anyone would like to raise before we finish?
- I think we've achieved what we want for today
- Are we all clear what we need to do for the next meeting?

5.17. Suggesting and Agreeing on Time, Date and Place for the Next Confcall

- Can we set the date for the next meeting, please?
- So, the next meeting will be on ... (*day*), the . . . (*date*) of.... (*month*) at ...(*time*)
- Let's next meet on ... (*day*), the . . . (*date*) of.... (*month*) at ...
- What about the following Wednesday? How is that?
- Is it agreed that we'll reconvene on (*date*)?
- Can we agree on the time of our next meeting?

5.18. Thanking Participants for Attending

- I'd like to thank *Marianne* and *Jeremy* for joining us from *London*.
- Thank you all for attending.
- Thanks to everyone for attending.
- Thanks for your participation.
- I'd like to thank you all for your contributions today

5.19. Closing the Confcall

- The meeting is finished, we'll see/speak to each other next ...
- The meeting is closed.
- I declare the meeting closed.
- Until next time, goodbye and thanks to everyone
- That's it for today, see you/speak to you.....

6. POST-CONFCALL CONTACTS

6.1. Post-Conference Telephone Calls

- Hello (*name of participant*), I'm just calling to ask you...
- Hello (*name of participant*), I'm just calling to remind you...
- Have you received your copy of our action notes?
- Did you get your copy of the minutes?
- Have you made any progress with...?

6.2. Post-Conference Email/Fax/Letter/Memo

- An Email/Fax/Letter/Memo should be sent confirming details of decisions made actions to be taken and by when as soon as possible the Conference Call
- A reminder Email/Fax/Letter/Memo should be sent after a suitable period of time
- An Email/Fax/Letter/Memo could be sent asking for progress details

7. AFTER THE CONFERENCE CALL

- Your conference call is over and it is now time to take stock....
  - ➢ Was the meeting a success?
  - ➢ Were established goals and objectives reached?
  - ➢ What follow-up steps remain?
- Of all the steps taken to plan, prepare and hold a business meeting, the most strategic work may very well take place after the physical meeting has ended
- As a meeting leader, you must be able to assess the results of your conference call, to follow-up on pending action items, and to plan better meetings in the future
- Every meeting is a process, and evaluation makes the process complete.
- Hopefully, your meeting was held with a purpose, and it is now time to see whether that purpose was met
- If the purpose was not met, then you need to look carefully at the process you followed for meeting planning and preparation
- If the meeting failed to meet its purpose was it because of poor planning, a lack of preparation, bad timing, participant issues, or was the meeting inappropriate from the start?
- As you examine and evaluate these issues, you need to look at five key meeting characteristics:
  - ➢ Meeting Results
  - ➢ Meeting Process
  - ➢ Participation and Tone
  - ➢ Next Steps
  - ➢ Future Improvements

8. CONFERENCE CALL ASSESSMENT CHECKLIST

8.1. Evaluating Meeting Results

- What was the purpose of the meeting? (*to disseminate information, make decisions, get feedback or some other purpose)*
- Was the purpose met, and to what extent? *(fully, somewhat or not at all)*
- Were planned decisions made as required and expected?
- If decisions were not made as expected, why not?
- Based on the results of the meeting, was this meeting necessary and worthwhile?

8.2. Evaluating the Meeting Process

- Did the meeting start and end on time?
- Was the meeting held at the right time and in the right place?
- Was the correct mechanism and venue used *(physical meeting, phone conference, video conference, web conference)?*
- Could better results have been achieved through a different meeting mechanism?
- Were any technical or logistical problems experienced?
- Did all or most invitees attend?
- If attendance levels were not as required and expected, what was the cause?
- Were the presentation materials effective?
- Were the presentation materials *(including the agenda)* properly prepared and distributed in advance of the meeting?
- Did the quality or quantity of presentation materials enhance or diminish overall meeting success?
- Was sufficient time allocated for the meeting?
- Was the meeting too lengthy or too short?

8.3. Evaluating Participation and Tone

- Were all agenda items covered? If not, what was the reason?
- Are you satisfied with the quality and quantity of meeting participation?
- If participation was not as expected and as required, why not?
- Did you have the right mix of attendees and participants?
- Were participation roles and responsibilities communicated and clarified prior to the start of the meeting?
- Was the discussion properly controlled and managed?
- Were certain individuals allowed to dominate the discussion to the detriment of others?
- Did the meeting have a positive or negative tone?
- If the meeting tone was negative, what was the reason, and could the negativity have been avoided?
- Did the meeting "tone" have a negative or positive impact on overall meeting success?

8.4. Evaluating Next Steps

- What next steps and action items were identified and assigned at this meeting?
- Were these steps and assignments appropriate considering the original purpose of the meeting?
- Were the next steps and action items fully documented at the end of the meeting?
- Did all participants leave the meeting with a clear understanding of all the next step assignments and action items?
- What procedures will be followed to ensure that assignments and next steps are properly executed and completed?

8.5. Evaluating Improvements

- Based on your responses to the aforementioned questions, what improvements can be made to meeting plans and preparations in the future to ensure that...

  - ➢ Meetings are appropriate to the communications needs at hand.
  - ➢ Goals and objectives are met.
  - ➢ Planned decisions are made as needed.
  - ➢ Meeting venues and mechanisms are utilised effectively (*i.e. physical locations, phone conferencing, video/web conferencing*).
  - ➢ Presentation materials are appropriate and distributed on a timely basis.
  - ➢ Meetings start and end on time, and that all agenda items are covered.
  - ➢ Maximum attendance and participation is realised.
  - ➢ Internal conflicts are controlled and minimised.
  - ➢ Participants and attendees are engaged and cooperative.
  - ➢ Meeting time is well managed.
  - ➢ Next steps are properly identified and assigned.

- Depending on the nature of the meeting itself, and your individual assessment requirements, you may choose to conduct your meeting evaluation as a personal exercise, or as a formal survey of meeting participants.
- No matter how your assessment process is conducted, the goal is simple: to gather sufficient information to determine whether the meeting was a success, and to identify any immediate corrective measures.
- It takes a good deal of effort to plan and hold an effective meeting, and it does not end when the meeting is over
- Learn from experience, and make improvements in the future.