

An Effective Chairperson's Checklist - Creating phone meetings that work

Prior to your meeting via audio conference

Before you schedule your conference call

- draft your meeting purpose and an agenda with "bite sized" pieces;
- determine how long the meeting will last;
- consider the impact of time zone differences when selecting a meeting time and the identifying participants to be invited.

At least three days before your scheduled conference

- invite participants to the phone meeting, including a meeting starting time and an ending time;
- distribute your finalized agenda to all those invited.

About 10 minutes before you start your conference call

- make sure you're about to conduct your meeting from a quiet area;
- hang out a "Do Not Disturb" sign, if you use electronic chat tools change your status to "Busy" or "On The Phone";
- ensure you have a list to hand containing the names and telephone numbers for each of the persons invited to the meeting - this will save time if you are waiting for someone to join the call and need to contact them urgently. Place it next to your written agenda in front of you;
- take off your watch and place it immediately in front of you, or use a timer;
- if your phone has a "call waiting" feature, turn it off;
- if your phone has multiple lines, turn off the ringers.

At 3 minutes before your conference is scheduled to begin

- dial into the conference centre. If you're conducting an informal meeting, you'll be early enough to welcome your guests. If you're conducting a more formal meeting and will be entered into the conference last, it's still important to be a little early so that the operator knows the chairperson is ready;
- if you're leading an Operator Dial Out conference call, be sure you're at your telephone to receive your call.

During your audio conference

During the start of your conference call

- welcome everyone at the exact scheduled start time;
- remind participants to identify themselves before speaking;
- acquaint everyone with the self-mute feature, especially those joining from cellular phones and public pay phones;
- outline for the group the purpose of the meeting, the basic agenda topics, the time allotted for each agenda topic, and the anticipated time the meeting will end;
- start with "green lights" to create a positive climate for the group.

During your entire conference call

- maintain a positive climate for discussion, but don't agree just to be agreeable;
- take ownership for keeping the meeting on schedule. The most effective way to do this is to manage the time allotments for each agenda "bite." Keep your eye on the watch or timer in front of you;
- allow participants to completely finish presenting their information before anyone is asked to comment;
- using your list of those invited, make a check mark next to the name of each participant every time they make a contribution. You'll quickly see who hasn't yet participated. Elicit comments from those who haven't spoken.

During the conclusion of your meeting

- summarize the key points or "takeaways" from the call;
- establish the time and date of your next conference call.

After your audio conference meeting

- book the audio conference facility for the date and time of your next conference call;
- distribute your meeting notes within one business day, including any commitments for action and the date and time of the next conference call (include the audio conference bridge details if a dial-in call);
- consider asking for written feedback from participants.

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