

TIPS ON LEADING A MEETING WITH REMOTE PARTICIPANTS

Agenda:

Make sure every meeting has an agenda and it and all items to be reviewed are distributed to all participants prior to the meeting. Nothing should be shared and discussed at a meeting unless everyone participating has a copy. (No - we'll send you a copy after the meeting...)

Introduce yourself and take a roll call:

Begin the meeting by introducing yourself and your location, stating the objective of the meeting, and giving instructions for audience involvement. (See - *Set the rules*) Take a roll call. This will give attendees an opportunity to let you know they have joined the meeting and avoid folks talking over each other while trying to let you know they are on the call. It will also help those on the phone know who is at the meeting and who is not.

Meeting helper:

For large meetings, ask someone in the meeting with you to act in the role as interpreter for those on the phone regarding non-verbal communication. ("She is pointing to the red circle", "We are laughing because...") They can also help with repeating a question or ensuring participation from those on the phone if the meeting leader is busy with facilitation.

List all on phone:

Keep a list (on a table tent) next to the phone identifying those who are on the call. This will remind those at the meeting who is on the phone and to include them in the conversation. Call on people you have not heard from during the meeting to give them an opportunity to participate.

If you are the leader:

Stick to the agenda, control interruptions, anticipate problems and be prepared with solutions and make frequent changes in speakers by calling on specific participants for their input or questions.

Set the rules:

Before the meeting begins, remind every one of the ground rules during a meeting with a teleconference:

- State one's name before speaking
- Keep background noise to a minimum; use the **mute** button when not speaking
- Keep comments concise and focused on the topic
- Speak loud and clear enough for all to hear
- Callers should use handsets rather than speaker phone whenever possible
- Those using conference phones in the meeting room should move to a speaker before speaking
- Those in the meeting room should remember the speakers can pick up sidebar conversations and paper shuffling which can be distracting and confusing for those on the phone.

Remember this simple, 3-step rule:

- Review the agenda
- Summarize decisions and action items
- Don't Be Afraid to Pause (to give those on the phone an opportunity to speak)



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Be direct:

"Please look on page 7 and we'll discuss the diagram..." is more direct and effective than, "The next diagram we'll discuss is found on the next page..." Using active, direct language will stimulate and hold your audience's interest.

Name names:

Call on people by name and location ("Chris at Longwood, what do you think...?") when asking questions or soliciting their reactions. With large audiences, call on groups of people by their site ("Let's hear from HBS on this one...") or university role ("How does the Office of Work/Life feel about that...?").

Stay on schedule:

Be respectful of everyone's time and start and end on schedule. It is wise to start meetings at 5 minutes past the hour (10:05 AM) to allow time for participants to end one meeting and arrive to the other. Remember not all discussions have to take place during the meeting. You can agree to call someone after the meeting for a more in-depth conversation.

Check in:

Periodically throughout the meeting check in with those joining remotely to ensure the technology is working correctly, they can hear, see slides, etc.

Reach closure:

When preparing to close, do the following:

- Ask for summary statements
- Recap action items
- Thank everyone for their participation
- Use a formal sign-off to end the conference ensuring to say good-bye to the callers on the phone and close conference call line

After the meeting:

Maximize productivity by forwarding the minutes of the meeting and any other pertinent material to all participants within a reasonable timeframe. Obtain feedback from the participants regarding the effectiveness of the meeting.

