

Task Force on Technology

Conference Calls

Process, suggestions for conducting an audio telephone conference call

Experience has shown that there are three stages to conducting an effective conference call: preplanning; the call, and follow up.

A. Preplanning

- **Moderator**

1. Select a time and day. Remember to consider the time zones where the participants live. You can also ask the participants for their day and time preferences. However, it can be difficult to establish one day and one time that is convenient to everyone.
2. Establish the length of time for the call. Conference calls can become tedious when they are too long. Usually, a one-hour time frame is sufficient.
3. If necessary, make a reservation for the call with your conference call service provider.
4. Do you wish to have additional services from your conference call service provider? Decide if you want the call to be operator-assisted, recorded, or made available on a Web site following the call. You may also wish to order a transcript. Be sure to inquire if there are fees for these additional services, so that you know in advance and can adhere to your budget.
5. Create an agenda. Keep it simple with only a few topics, so that the call is focused. If additional participants are assigned to cover specific topics, be sure to brief them about their role and give them an overview of the agenda prior to the call.
6. Send participants an invitation that includes the agenda and instructions. As a courtesy, give ample advance notice, e.g., two or three weeks, to the invitees. Be sure to indicate the time zone that the call will take place, e.g. 2 p.m. ET.
 - ✓ Include a deadline to RSVP. Do not exceed your conference call provider service's limits for the number of participants.
 - ✓ Instructions should include the participants' pass code, an emergency operator telephone number if anyone is not able access the call, and an alternative telephone number for the moderator.
 - ✓ Send a reminder notification along with the instructions, and the agenda two or three days before the call.
7. Prepare an evaluation form to send to the participants.

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- **Participants**

1. RSVP to the moderator's invitation by the requested deadline.
2. Review the agenda and the materials prior to the call so that you are prepared for the discussion.
3. In the event that you are unable to participate in the call, notify the moderator in advance.

B. The call

- **Moderator**

1. Be sure to have instructions that include the moderator's and participant's pass codes when you dial the toll free access number.
2. Access the conference call at least five minutes ahead of the scheduled time.
3. Begin the call on time. Although it is disruptive, stragglers can always enter at a later time.
4. Have the callers identify themselves (roll call). If the call is operator-assisted, the operator will announce each participant's name as she or he arrives.
5. Determine if all participants are present.
 - ✓ Review the procedure for speaking and special codes such as "*6" to mute a call or "*0" to request an operator.
 - ✓ If the call is being recorded, inform the participants as a courtesy.
 - ✓ It is suggested to create minutes or a recap of the conference call discussion. The moderator can take the minutes or ask another participant to do so. Let the participants know before the call begins whether or not they will be receiving a summary of the conference call discussion.
 - ✓ Introduce each agenda item. Adjust the agenda, if needed. Remember, it is the moderator's role to keep the discussion on topic.
 - ✓ Summarize the conclusion of each agenda item before moving on to the next topic.
 - ✓ Be mindful of the time allotted for each agenda item. You may have to end the discussion or opt to continue it at another time. If you cannot cover an agenda item, table it.
 - ✓ If applicable, let the participants know they will receive minutes and an evaluation form. Be sure to request feedback on the call so that you will know how to plan future calls.
 - ✓ End the call at the scheduled time.

- **Participants**

1. If you cannot participate in the call, it is a courtesy to notify the moderator in advance of the scheduled call.

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2. Have the agenda and all other necessary documents ready for the call.
3. Enter the conference “room” at the scheduled time. It is okay to be a little early in case you need operator assistance to access the call.
4. Follow the protocol for sharing.
5. Stay on topic and limit the length of your comments so that everyone has a chance to participate in the call.
6. Take notes. The summary you receive may not have the specific information you wanted or need to recall.

C. Follow up

- **Moderator**

1. Send a “thank you” message along with an evaluation form to participants immediately following the call. Set a deadline to return the evaluation.
2. Prepare minutes or summary of the call for the participants within two or three weeks after the conference call.
3. Make note of any topics that need to be discussed in the future.
4. Consider whether or not you need to speak with the members who were unable to participate in the call or are the recap materials adequate.
5. Review the evaluations. You may wish to share the information with the participants.

- **Participants**

1. Complete the evaluation form and return it to the moderator.
2. Review the recap and complete any follow up assignments in a timely manner.

Challenges and solutions

1. **Challenge**—Informing Areas about the value of conference calls as an effective means of communicating with Area World Service Committee members, and other Area Committees.

Solutions—

- Find Areas who are already using conference calls effectively and can share their experiences with other Areas.
- Explain how Area service arms can use conference calls effectively, e.g., cost cutting benefits by reducing Trusted Servant travel expenses and time away from home needed to attend AWSC or Area Assemblies.

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- Area Coordinators and Trusted Servants can use conference calls as a way to touch base with districts or groups that are not active i.e. connect more people and more groups particularly in large districts.
- Show how conference calls to connect more members and groups

2. **Challenge**—How can Districts, Al-Anon Information Services, and other Al-Anon Committees use conference calls to derive similar benefits (reduced travel costs and less time away from home for the Group Representatives and other Trusted Servants) from conference calls as the Areas?

Solution— Have Areas give workshops and model the use of conference calls to District Representatives, Al-Anon Information Service liaisons, and Conference Committees by having Trusted Servants participate in conference calls and assist with Area level workshops.

3. **Challenge**— How to avoid conference calls becoming tedious and overwhelming in terms of content?

Solution— Educate members that experience has shown that effective conference calls are limited to one-to-three subjects and a short duration of time, e.g., one hour. Materials from conference call vendors also make the same recommendations about preparation of an agenda and the length of time for a conference call. Ask Areas to share their experiences in setting up an agenda and a time frame for their conference calls. There may be some Areas who are able to have Area Assemblies via conference call that take place in a short period time.

4. **Challenge**—How to encourage Areas to weigh out the benefits of free versus paid conference call services?

Solution—While “free” services will be more attractive, members should be encouraged to explore both paid and free conference call services so that they can compare the different features and ascertain the advantages, and disadvantages of each type of service. Members also need to find out if there is a contract for a defined period of service, e.g., one year.

5. **Challenge**— How to find a day and time convenient to all or the majority of members?

Solutions — Set dates for conference calls well in advance as is done for Area Assemblies so that members have ample time to schedule themselves for a conference call. Some conference call services do provide an audio recording or transcript services. For example, members who could not participate in the conference call could go to a Web site to access an audio recording or a transcription of the conference call as alternatives to taking part in the call at the actual time it takes place. An alternative day and time could also be offered to the members.

6. **Challenge**— How to encourage all members to participate in the conference call discussion?

Solutions— Some members are more reticent to speak than other members. While they may prefer to listen, the moderator is responsible for offering members who have not spoken the opportunity to share. The moderator can use the roster as a tool to track who

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has or has not spoken so that members who have shared more than once on the same topic can be asked to wait to speak again until everyone has had an opportunity to talk. It may also be helpful to set up and explain the procedure for sharing prior to addressing the agenda items, e.g., speaking on a topic only once until others have shared. If the moderator needs assistance in tracking members who have or have not spoken, another member can be asked to provide support. For a large number of participants (50 or more), operator assistance may be helpful.