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## The Secrets to Masterful Conference Calls

(Adapted from *The Secrets to Masterful Meetings*)

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In today's business world, many meetings take place over telephone lines, through the Internet, using video-conferencing and via other technology vehicles that allow participants to be in different geographic areas. While these vehicles can reduce the cost of meetings, they can also present significant challenges to the meeting leader. For, despite the geographic dispersion, the meeting leader must still find a way to get the participants excited from the very beginning, keep everyone engaged and focused on the objective, gather and document the critical information, build consensus, manage dysfunction, keep the energy high, and close with a clear understanding of what was accomplished, the value of the accomplishment and the steps to be taken once the meeting ends.

When it comes to conference calls and other meetings with remote participants, it is even more important to utilize the *Secrets of Facilitation* to achieve success.

1. Distribute the meeting objectives, agenda, ground rules and any relevant handouts prior to the meeting. If multiple time zones are included in the meeting, be sure to specify the time zone when informing participants of the start and end times.
2. In planning the meeting, limit agenda items so that the entire call can be completed in two hours or less. If necessary, break the meeting into several calls. It is difficult to be productive and to maintain group participation with extended call times.
3. Consider having participants do preliminary brainstorming and submit their ideas prior to the meeting. You can summarize these ideas into "brainstorm lists" and send them in advance to participants along with the agenda and other written materials. This advanced preparation allows more time in the meeting to be spent grouping, prioritizing, or evaluating the brainstormed material.
4. Consider having multiple people at the same location assemble for the meeting in a conference room or some other suitable environment. Having as many as possible in the same room promotes teamwork and helps people avoid the temptation to multi-task (for example, answer emails) during the meeting. With each "call-in" location, consider appointing a scribe to document key points during the meeting on flip charts.
5. Prior to the meeting, create a list that shows the name and location of each person expected in the meeting.

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6. At the beginning of the meeting, conduct a roll call: ask each person to state name and location. Try to address participants by name throughout the meeting to help people link names with voices.
  7. In getting the session started, perform a traditional “inform-excite-empower-involve.”
    - ❑ Explain the purpose of the meeting;
    - ❑ Get the participants excited about participating by explaining the benefits to them of a successful outcome;
    - ❑ Let them know the authority that has been given them; and
    - ❑ Get them involved by asking a Type-B question that engages them in meaningful discussion that contributes to the work to be done.
  8. Consider adding specific ground rules to assist with “remote meeting etiquette,” such as the following:
    - ❑ Announce yourself when joining the meeting and inform the group if you are leaving prior to the end of the meeting;
    - ❑ Always identify yourself before speaking;
    - ❑ Avoid using the “hold” button, especially when music or other sounds result.
    - ❑ Stay 100% focused during the meeting; avoid doing other work, answering emails, etc.
  9. Use round robins frequently to get input from everyone. Follow the same order each time, calling people by name. Establish this order early in the meeting.
  10. Establish a verbal method for doing consensus checks, such as a round robin, where each person indicates agreement or disagreement.
  11. Consider using meeting software that allows all participants to view on computer the information that is recorded while the session is on-going.
  12. Do considerable summarizing and use frequent prompt and playback questions to make sure that everyone understands the focus of the discussion and what is being said.
  13. Review all issues, decisions and action items prior to ending the meeting to help ensure full understanding and commitment to action.
  14. Publish a re-cap immediately after the meeting.

Interested in learning more facilitation techniques? Check out our course, [The Effective Facilitator](#).

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