



## Virtual Conference Call “Best Practices” Checklist

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Globalization, technological advances, telecommuting and outsourcing have all created a workplace where leaders seldom see the individuals they lead. With so many leaders managing team members who are living in different time zones, countries, and continents, or even just in different locations in the same city, there is an ever increasing need for people who don't see each other frequently to figure out how to handle virtual conference calls more effectively.

The following conference call best practices were collected using interviews, focus groups and our own experiences in working with global and virtual teams. We appreciate your feedback and invite you to share your own experiences and suggestions for future versions.

### Conduct Virtual Meetings

#### Prior to Conference Call

- \_\_\_\_\_ 1. Determine the overall purpose and desired outcomes of the meeting; *if the meeting can be handled with a pre-read or meeting summary, consider not having the meeting.*
- \_\_\_\_\_ 2. Depending on the purpose, design the agenda to prioritize and focus on what is most important. Consider placing the most important items early in the agenda to allow for discussion and collaboration.
- \_\_\_\_\_ 3. Get input from others. Ask for agenda items, schedule pre-meetings with key stakeholders who require buy-in, etc.
- \_\_\_\_\_ 4. Consider whether or not there are standing agenda items.
- \_\_\_\_\_ 5. Plan for participation and engagement; allow time for dialogue.
- \_\_\_\_\_ 6. Consider inviting some people to only those parts of the meeting that pertain to them directly; prepare presenters to increase success.
- \_\_\_\_\_ 7. If there are quiet and/or new members who have less to contribute, consider assigning them a project/task to be presented at the meeting or a role (serves as time-keeper; captures action items/parking lot issues; evaluates meeting success/goals achieved).
- \_\_\_\_\_ 8. Send an agenda ahead of time (as early as possible) with allocated time slots for agenda items; consider pre-reads to maximize use of meeting time.
- \_\_\_\_\_ 9. Provide lead time for responses to requests; consider different time zones and multiple projects.

- \_\_\_\_\_ 10. Ensure members feel knowledgeable about and comfortable with the use of various electronic technologies.
- \_\_\_\_\_ 11. Distribute suggested ground rules and meeting etiquette ahead of time.
- \_\_\_\_\_ 12. Vary the meeting time so everyone has the opportunity to participate during their most creative and productive times. Consider rotation of global meetings so participants in other parts of the world do not always have to wake up early or stay up late.
- \_\_\_\_\_ 13. Reserve a conference room if you are easily distracted or multi-task in your own office.
- \_\_\_\_\_ 14. Secure a land-line and avoid cell phones. Cell phones go in and out of range, generate static noise and cease functioning.
- \_\_\_\_\_ 15. Consider technology options (video minimizes multi-tasking).

## During the Conference Call

### As a facilitator or presenter:

- \_\_\_\_\_ 1. Set the stage (virtually shake hands) with the audience before jumping into the topic.
- \_\_\_\_\_ 2. Ask to make sure everyone can see and/or has copies of all slide decks/handouts.
- \_\_\_\_\_ 3. Preview shared objectives, agenda topics and ask for additions/revisions.
- \_\_\_\_\_ 4. Assign any roles such as timekeeper or note-taker. When assigning a timekeeper, be sure that they give audio signals for the time checks at 5 or 10 minutes before the end.
- \_\_\_\_\_ 5. Plan for and provide internal summaries and transitions; make sure key points are reinforced.
- \_\_\_\_\_ 6. Introduce and welcome any guests or new members.
- \_\_\_\_\_ 7. Collaboratively define ground rules/behavior that will contribute to the “success” and trust of the group (ground rules).
- \_\_\_\_\_ 8. When using documents or slides, indicate the page you’re on and when you’re changing pages; use “verbal pointing” such as, “Let’s focus on the key point in...” or “Now we’re moving to slide 6...”
- \_\_\_\_\_ 9. Emphasize when there is a need for confidentiality of communication within the meeting to protect contributions.
- \_\_\_\_\_ 10. Ensure copyright adherence for documents.
- \_\_\_\_\_ 11. Monitor talk time to ensure everyone has a chance to participate.
- \_\_\_\_\_ 12. Make sure virtual attendees are engaged and participating.
- \_\_\_\_\_ 13. Stop and ask for questions or anticipate questions; for example, “if I were you, I’d notice...” or “A question I was asked...”
- \_\_\_\_\_ 14. Summarize purpose and any action items or next steps.
- \_\_\_\_\_ 15. End meeting promptly or ask permission for extra time.

### **As a participant:**

- \_\_\_\_\_ 1. Use “mute” button sparingly, i.e., only if there is noise in your environment.
- \_\_\_\_\_ 2. Identify yourself when you speak for the first time virtually with a small group (4-5 people).
- \_\_\_\_\_ 3. Identify yourself every time you speak in large telecons (5 or more).
- \_\_\_\_\_ 4. Gesture normally; greater vocal variety and interest occurs when speakers gesture.
- \_\_\_\_\_ 5. Ask questions if you don’t understand something or have lost the conversation thread.
- \_\_\_\_\_ 6. Encourage others to participate when you know they have key points to add.
- \_\_\_\_\_ 7. Be fully present; avoid multi-tasking.
- \_\_\_\_\_ 8. Avoid moving the speaker phone or rustling papers in front of the phone. It’s painful on the ears of those dialing in!

### **After Conference Calls**

- \_\_\_\_\_ 1. Use desired objectives and purpose as a benchmark to evaluate meeting success.
- \_\_\_\_\_ 2. Evaluate participation and engagement. Who was engaged and how did members contribute?
- \_\_\_\_\_ 3. Ask participants to provide feedback and suggestions for improvement. Was the meeting valuable? Was it necessary?
- \_\_\_\_\_ 4. Follow through on action items and commitments.
- \_\_\_\_\_ 5. Send pre-published goals and presentation materials along with meeting summaries to absent members.
- \_\_\_\_\_ 6. Offer an alignment tool for members to use moving forward (website links, team charter, action plans, etc.).
- \_\_\_\_\_ 7. Include *all* participants when assigning action items, rather than relying only on those members who are physically present.