

NACCHO's Guide to Leading Engaging and Effective Small Group Conference Calls



PREPARE FOR THE CALL

1

Create an agenda and goals for the call

Have clear expectations for how long each segment of the call is expected to last and who will lead each segment of the call. Engage the other leaders of the call to ensure that you are all on the same page. Have a clear start and end to the call. Send out any supplementary materials 24 hours in advance of the call.

2

Rehearse your processes

Practice how you will call on individuals and see where the agenda may be missing something that can help you achieve your goals. If you plan to use technology beyond the phone, practice using that technology a few days before the call to troubleshoot any issues.

3

Picture the faces

If possible, send a document with a picture of everyone who will be on the call so that all participants have names to associate with the faces of the people who will be on the call. This will make things more personal.

4

Appeal to people with various learning and communications preferences

Think about how your call will appeal to people who learn and process information best through human interaction, data and numbers, solid processes, and big-picture ideas and visions. Ensure that at least one item on the agenda touches each style.

CONDUCT THE CALL

- 1 Start the call on time and open with a question**

Start your call with a simple question for everyone to answer. It can be a check in about day-to-day business or something more visionary. Make sure every participant answers this question so that you hear each voice at least once.
- 2 Review some basic etiquette rules**

Remind participants not to put their phone on hold, to state their name each time they speak, and to stick to the agenda to have a more productive call.
- 3 Summarize what was stated**

Recap what was stated by the participants on the call before you move on to the next agenda item to ensure that all participants heard comments correctly.
- 4 Ask specific questions**

Asking direct and specific questions on a call will solicit succinct responses and thus keep participants more engaged. As needed, call on participants by name to ensure that every person speaks at least once during the call.
- 5 Take notes**

Assign a scribe to make a written record of the conversation. These notes may prove to be important during future calls or when new people join the project or group.
- 6 Allow time for silence**

Some people will give you their best answer after they have had a moment to think without hearing other voices. Allow a minute or two of silence for this type of processing. Invite participants to e-mail you with any thoughts, concerns, or questions after the call.
- 7 End the call on time and close with an answer**

At the end of the call, review the next steps and tasks that have been assigned to the participants. Ensure that everyone agrees with the plan for moving forward.

AFTER THE CALL

Schedule your next call

If this is not a regularly scheduled call, send a Doodle or otherwise schedule your next call. Doing this as close as possible to your initial call will maintain the momentum of the group.

Send the minutes

E-mail the notes from the call to the participants and ask if anything was missed or if edits are needed. Share these notes with anyone who was unable to participate. Highlight action items.