Tips on Facilitating Videoconferences and Teleconferences

Reference Chapter 8 in
Requirements by Collaboration **by Ellen Gottesdiener, Addison-Wesley, 2002.**

Prepare yourself and the participants.

1. Create an agenda by working with your planning team and as many participants as you can.
2. Distribute the agenda to all participants several days before the meeting. Specify any material that participants need to bring, along with logistical information.
3. Set specific, short-term targets for each agenda item. Specify the desired outcome of each agenda topic—for example, "a decision on…" or "a list of …".
4. List participants by locations.
5. If possible, ensure that all locations have about the same number of participants.
6. Draw and distribute a diagram to show who is present from which locations.
7. Appoint a moderator for each location. The role of the moderator is to help the primary facilitator monitor the time, encourage participation, test the equipment before the meeting and when returning from any breaks, and distribute pre-meeting materials.

Prepare the room.

1. Test the equipment 30 to 15 minutes before the meeting.
2. Have a backup plan if the equipment is not working.

Get a good start.

1. At the opening, use icebreaker questions for the roll call (e.g., "my favorite movie").
2. Confirm that all planned participants are present.

Monitor the time.

1. Structure the agenda into small chunks of work with specific goals. This helps to divert tangential discussion; for example, say, "Thanks for bringing that up, George. We will address it during the ____."
2. Limit the meeting to 60 or 90 minutes. Set time limits for topics, and remind the group when they are coming close.
3. If you are meeting for more than an hour, take short breaks.
4. Ensure that there is a clock in a prominent spot at each location to help people get and keep a sense of time.
5. Assign a single recorder for the meeting, and be clear where and when the notes will be available to all participants.

6. Ask each person to draw a circle on a piece of paper and mark the hours (like a clock), and assign each person a spot on the clock. As each person speaks, suggest that participants mark the spot on their clock and make notes. (If you have more than 12 people, add half-hour slots, e.g., 12:30, 1:30, etc). If you use this tool, the facilitator can use the clock to check on the degree of participation.

Record the meeting with the end in mind.

1. If possible, e-mail notes as the call is happening to all locations. In videoconferences, consider having a camera on a flip chart being used by the recorder to record the meeting.
2. Have the recorder set up categories such as "actions" or "next steps"; "issues"; "discussion points"; and "decisions," and record notes into those categories.
3. At the end of the call, summarize notes in the areas of "next steps" or "actions" and "decisions" (the recorder can do this).

Keep everyone engaged.

1. Confirm that everyone can participate for the duration of the call; if someone must leave, have her tell the group so that everyone knows she has left.
2. Ask everyone to state his or her name and location before speaking ("This is Ellen in Jamaica").
3. Start each topic with a round robin in which each person speaks (answers a focus question or makes a comment on the agenda topic) for a specific amount of time. Follow this with general discussion. In this way, everyone has a chance to voice his opinion without contention on the phone.
4. When you are not talking, put your phone on mute.
5. Ask questions of people in a location—for example, "Any questions from location A?"
6. Ask each person to preface her question or comment with the name of the person she is addressing ("Joe, what do you think about…?"), the entire group ("Everyone, what do you think about…?") or a location ("Location A, can you…?").
7. Keep the energy up by using people's names, not letting anyone dominate the discussion, and soliciting input from each participant at each location.
8. Check frequently with participants for their feedback on how the process is going. It is easy to lose people's energy and focus on the phone!

End with the next beginning in mind.
1. Acknowledge accomplishments at the end of the meeting.
2. Reserve 5–10 minutes to evaluate the call process. Ask each person to (a) rank the call on a scale of 1 to 3 (1 is poor and 3 is great), (b) explain the ranking in 20 seconds or less, and (c) make one specific suggestion for improvement if possible (during your greeting, warn people you will be doing this).