



Conference Call Guide

- Coordinate with Administrator (if applicable) of the conference call service you plan to use to set up meeting and get link and/or phone information well in advance of the meeting.
- If there does need to be a meeting Administrator to start and end the meeting, will it be ok if that person sits in on the meeting or would you prefer that person walk away once the meeting is in progress and wait for contact by other means to end the meeting.
- Send meeting info to members/guests at least 7 to 14 days in advance. Consider who you want to attend and if there are any confidentiality issues. You may want to caution anyone that is invited that they are free to, or should not, share the meeting invitation with anyone. Also consider the limit on number of attendees on the conference service you use.
- Send a reminder 1 to 2 days before the meeting. Include any agenda or documents to reference during the meeting that attendees may need. Note any confidentiality of these documents if you do not want them shared. *pdf copies are easy to open in case attendees don't have the same version of Office or whatever format the documents were made in.
- Agenda should be developed to keep the meeting within conference service limits if any.
- Decide who will run the meeting and who will handle any on screen presentations that might be presented. It may take multiple people to run a meeting depending on the number of attendees and the items to be covered.
- Consider developing a script that will help with verbiage to be used and keep the meeting on track and on time, but still give an opportunity for questions once all objectives are met. Questions in the middle of a meeting tend to get the meeting off schedule and hard to get back on track.
- Will you want a transcript/video recording or list of attendees if the conference call service is capable of doing that?



Etiquette

- Be respectful and patient. Many people may want to talk and if everyone tries to talk at once it just gets very confusing.
- Understand how to mute your computer microphone or telephone microphone. Microphones pick up lots of background noise and should be muted during meetings to cut down on that noise unless you have a part in the meeting, something to comment on, or have a question. Too much background noise makes it difficult for everyone to hear.
- Be aware of your background. Test your camera settings prior to a meeting if possible. Too much background light will make it hard to see you and it seems to work best if the camera is at eye level so other guest are not looking upward at your face or just the top of your head.
- If the organizer sent out attachments ahead of time that relate to the meeting it is good to have those handy to refer to while the presentation is going on.
- If this is a tiled meeting try and be in a room that will allow you to isolate yourself from anyone else in the home.
- Make sure you are using the correct link for the meeting. If a practice was scheduled a few days before the meeting there are probably separate links/phone numbers for each one. If you use the wrong one you won't be able to join the meeting.
- Try to get signed in or call in at least 5 minutes before the meeting starts. This will allow you to troubleshoot any problems without interrupting the meeting. Some conference call products also allow the administrator to "lock" the meeting and if you are late you might get locked out.