

## 11 Tips for S.U.R.E.-Fire Telephone Meetings

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- 1. “All Meetings are Created Equal.”** In the rush from one virtual connection to another, we don’t always prepare for phone meetings in the same way we’d prepare for a face-to-face meeting. We suggest approaching telephone meetings like any other meetings, by preparing for key questions: Who should be on the call? What’s the purpose of this call? What do we want to achieve by the end of it?
- 2. Okay – Who Wants to Facilitate?** Argh! We don’t like to hear that at the start of a telephone meeting – it immediately makes you start doubting whether the meeting was planned sufficiently. When planning the agenda, consider: Who is the best person to facilitate this meeting? Then, put their name right up top so people know beforehand who’s facilitating.
- 3. Visuals Matter More Than Ever.** When preparing for in-person meetings we are usually mindful of the importance of visuals. We realize that the brain processes images faster than words, and remembers them longer, so we prepare visuals to distribute around the room. We suggest doing the same for your telephone meetings: What visuals will help convey key concepts efficiently? How can we best get those visuals in front of people before or during the meeting? We like sending people pdf files before the meeting, with a request to have them handy during the meeting.
- 4. Find the Right Technology.** You’ve got options for telephone meetings and each one affects the meeting differently. For example, telephone-only has the advantage of letting people call in from anywhere and is usually free/cheap, but a computer-based platform lets people see each other and/or see the same visuals on the screen. At GLP, for our computer-based telephone meetings, we often pre-load files onto the shared space, use shared desktop, and/or share files in real time.
- 5. More about Technology.** The last tip probably raised a bunch of questions for you, right? When it comes to technological options, the questions are endless – because the possibilities are endless: “What’s the best way for people to work simultaneously on a document during a meeting? How do you like Adobe Connect? Is it better than WebEx?” The questions certainly go beyond the scope of these 11 tips, but we will say this: Focus first on the purpose of your telephone meeting and get your meeting achievements crystal clear. Then, decide what people will need to do together during the call and choose a technology accordingly.
- 6. Create a Culture of Homework.** Yes, just like your teacher did in the first grade, create a social norm that people do their homework before they attend the meeting. As facilitator it’s on you to make sure the meeting achievements are set with enough lead time for you to decide what kind of homework



would be most helpful. Send it out with plenty time, telling people how the homework will feed the dialogue and/or decisions to be made on the call.

- 7. Decisions.** Did I say decisions? Decisions on a phone meeting get made all the time but, even more so than in face-to-face meetings, there often seem to be different recollections of what got decided, if anything. So, how about making sure you have a note-taker on the telephone meeting and preserve time before the end of the call to review the following: Were any decisions made? If so, what were they? Keep the meeting notes super brief or no one will read them. Send them to all meeting participants right after the call with an invitation to review them for differences of perception.
- 8. Facilitation.** Giving advice to facilitators of telephone meetings is tough because everyone has their own style and there certainly isn't one way to do it. Consider opening up with some guidelines for the phone call (which can be simply revisited as a quick reminder for groups who meet regularly). In drafting these guidelines the group will agree about questions such as whether to say who you are before talking and whether to put the line on mute when not talking. But, you can also include in the guidelines requests you have as a facilitator, such as not talking over each other and not being afraid of a bit of healthy silent reflection on the line!
- 9. Introversion.** At GLP, we've been paying a lot of attention lately to the value of "solo flights of thought" to quote Susan Cain. That is, the value of having time to sit and think about something before talking about it. While this may be tough for extroverts, it's good for them! And, it's essential for introverts to be at their best.  
So, how about:
  - a. sending people ideas and questions in advance of the call for them to ponder;
  - b. creating time on a call for some breathing room; and
  - c. periodically asking the group whether they want to comment on anything that was already discussed, in case some more thoughts have come to them since it was first addressed?
- 10. Enough Already!** No matter how engaging the telephone meeting, people will need a break after less time than they would an in-person meeting. How much is too much for you on telephone meetings: 30 minutes, 60 minutes, 90 minutes? Usually after this, folks have had enough. Consider breaking a meeting into two or more parts with a break of anywhere from 15 minutes to a day in between!
- 11. Be S.U.R.E.** We'd be remiss if we finished these 10 tips without reminding you of GLP's S.U.R.E.-Fire Meetings principles: Safe, Useful, Respectful and Engaging. For each telephone meeting, ask such questions as: How can we make sure everyone on-the-line feels safe jumping in and sharing their perspectives openly? What will make this telephone meeting most useful right now? How can we best respect these folks' time and experience on the call? How can we make it most engaging, especially if we can't see each other on the call?