



Telephone Training Best Practices

Telephone-based trainings or conference calls have high value, low cost, and are quick and easy to set up. Try to think of a telephone-based training as a meeting that just happens to be occurring over the phone. This means the training can be as good or as bad as any other face-to-face session. It also means that you can control the quality of the call simply by doing all of the things that you do for an in person training or orientation, e.g., set an agenda, provide handouts ahead of time, stick to the subject, and so on.

Below you will find instructions for how to set up and facilitate a conference call training or orientation.

1. Choose your telephone call format

YFU offers two conference call possibilities, one for groups of 3-16 people and the other for groups of 17-50 people.

3-16 participants

For conference calls with 16 or fewer participants, YFU's own internal conference call rooms can be used. The drawback of YFU's internal conference call service is that someone in the District Office or National Office must transfer participants into the call; participants cannot dial into the call on their own. The two conference rooms, known by their extensions 801 and 802, must be reserved through the shared Outlook conference call calendar. Open the 801 or 802 calendar to view the available time slots and to make a reservation for your conference call

Participants should call the main District Office or National Office phone number and ask to be transferred into the 801 or 802 conference room. Be sure to provide participants with the correct phone number and conference room extension before the call.

17-50 participants

For conference calls with 17 to 50 participants, YFU uses an outside service provided by www.conferencecalls.com. Unlike the smaller group conference call option, this option will cost approximately \$.03 per minute per participant, but participants can dial directly into the call using an 800 number. In order to use conferencecalls.com your District will need to set up an account through the IT Department. Contact Jim Edmiston (jedmiston@yfu.org) to inquire about setting up an account for your district.

2. Planning a telephone-based training or orientation

Well organized planning is the key to a successful conference call. Consider the following items when planning your training or orientation.

Number of Participants

In order to allow people to participate in the conversation, a group of 4-8 people is the optimal size for a telephone-based training or orientation. Leading a call with more people is possible, but you will sacrifice the ability to have participants engage in the conversation. Both small and large group conference calls must be planned and facilitated very well in order to be successful.

Tips for large groups: Not all content is well suited for large groups, so be sure to think about how your planned agenda will be received in this less personal phone format. Large group conference calls are basically one-way conversations, so it is essential that facilitators are well chosen for their ability to clearly communicate information. Allowing for open, two-way conversation will make it impossible to get through all of the planned material. In order to allow people to ask questions, you can ask participants to submit questions by email before the call. At the beginning of the call, consider asking participants to hold their questions until the end when you can allow a few minutes for open discussion. Unanswered questions can be directed to the District Office or appropriate staff member by providing participants with a phone number.



Duration of Call

The optimal length for a telephone-based training is 1–1½ hours. After that participants are likely to be drawn or pulled to other tasks.

Facilitators

Choosing the right facilitator(s) is very important to the success of a conference call. Be sure to select people who will be able to lead a conversation in an effective and engaging manner. For small conference calls with fewer than 8 participants, one person may be sufficient, though having two call leaders will help break up the content and make for more interesting listening. For larger calls, two call leaders are needed as the interplay between these two people will help make up for the inability to have more open discussion among all participants.

Preparing the Facilitators

Gather the conference call materials to provide the call leaders with an organized packet of materials. Check in with the facilitators to be sure that they understand all of the materials and answer any question they have. With proper and inventive planning, it is possible to recreate face-to-face activities on a conference call such as role plays, brainstorming sessions, training or other applications.

Finalize the agenda

Each call leader should have a clear understanding of what he or she is going to say and what the order of presentation will be. Assigning someone to keep track of time is always a good idea as well.

Communication with Participants

Clear communication with call participants is more important than ever in a telephone-based training. Be absolutely sure that the date and time of the conference call are clear. Be sure to include instructions for how to get into the call, *what to do if a person gets disconnected*, and what should be done in the case that a person is not able to participate in the call.

Handouts

Send handouts to participants, via email, in advance. Be sure to label handouts very clearly so that they can be easily located by everyone during the call. This will minimize paper shuffling. Putting page numbers on the handouts is a good technique.

3. Executing a Telephone-based Training

The following are suggestions for how to facilitate a successful telephone conference call.

5-10 minutes before the call

The facilitators should meet in the conference call room to make sure that everything is ready to go for the call.

Start on time

Take attendance

Instructions

Provide instructions about re-entering the call if a participant is dropped.

Set the Ground Rules

By communicating a few pieces of telephone-based training etiquette at the beginning of your session, you will avoid having to interrupt your content to address them midstream. Below are several items that you might send in advance and address again before starting with the content. Conference call participants should:

- Find a quiet room and avoid doing loud activities such as washing the dishes.



- Mute your phones while not talking. This helps to eliminate all background noise.
- Introduce yourself each time you speak: "This is Cathy and I agree with..."
- If possible, do not use speakerphone. Speakerphones have a tendency to pick up background noise and prohibit the speaker from hearing others speak at the same time.
- If possible, do not use cell phones. Cell phones pick up static and can drop calls.
- Do not interrupt one another. Since there aren't any visual cues during a telephone-based training, participants should wait until the last speaker is finished before speaking.

Stick to the agenda

In order to finish on-time, be diligent about moving through the agenda at the planned pace.

Guide the conversation

People can sometimes be shy about contributing their ideas on a conference call. Conference call leaders will need to be proactive about drawing out contributions from people. One idea for smaller groups is to direct questions to specific people or to the group by asking people to respond in sequence, e.g., "Can I hear first from Bill, then from Elaine and Joe?"

Alternate between call leaders

Call participants are more likely to stay engaged if presenters alternate leading topics.

Check in

Check frequently for comprehension since you aren't able to rely on body language. This will not be possible in larger groups.

Encourage interaction

Add structural ways to ensure interaction and input (role plays, round table interactions, etc.). Interaction will not be possible in large groups, making the choice of presenters all the more important.