TWELVE TIPS

Twelve tips for facilitating successful teleconferences

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Abstract

Background: The work of medical education is increasingly collaborative across geographical sites, sometimes spanning international borders. The success of projects depends more strongly on how meetings are led and run than variables about the task itself; therefore, excellent communication using teleconferencing technology is required. However, we found no medical literature to assist with developing best practices in telecommunication.

Aim: Using the organization and management literature, which has examined the use of telecommunication in optimizing work outcomes, we provide a guide for initiating and facilitating teleconferences.

Methods: We used Tuckman's framework for group development as a means of organizing guidelines that address practical issues in approaching communication on teleconferences and discuss important aspects of forming work groups using telecommunication, setting ground rules and norms, addressing conflict, and enhancing accountability and outcomes.

Results: We identified 12 tips for optimal teleconferencing and divided them into phases of formation, setting ground rules, managing conflict, and enhancing group performance.

Conclusion: Successful work on teleconferences requires excellent attention to the group process, especially since full engagement by participants is not always assured.

Introduction

The work of medical education is increasingly collaborative, widespread, and multi-institutional, with projects often spanning national boundaries. Numerous factors affect collaborators' ability to meet face to face, including varying work schedules, limited meeting spaces and travel budgets, and concerns for the environment. Even within the same institution, collaborators encounter differing schedules and challenges finding central campus meeting venues, thereby creating difficulty coordinating a time and place for necessary in-person meetings. Fortunately, technological advances enable work on projects in virtual spaces, increasing the potential for collaboration; as a result, it appears that using telecommunication processes will increase in prevalence.

Telecommunication can be defined as any process of cooperative work that involves meetings of participants in different locations who are technologically linked. These meetings can either be synchronous (together in the moment, such as on a conference call) or asynchronous (not necessarily occurring at the same time, such as with e-mail or a listserv). Different mechanisms of telecommunication exist; in addition to e-mail and conference calls, videoconferencing and web conferences extend the range of verbal communication, and remote participants can access and simultaneously edit Internet-based documents.

Reports in literature indicate several advantages and disadvantages of telecommunication processes. Telecommunication often affords increased scheduling flexibility compared with in-person meetings. Another potential advantage, specifically with conference calls, is increased cohesion and more equalized levels of participation in diverse groups, potentially because of reduction in status differences due to diminished social cues (Martins et al. 2004; Staples & Zhao 2006); conversely, because of the preserved ability to read non-verbal information, cohesion may be improved in face-to-face meetings and videoconference formats (Hambley et al. 2007). Telecommunication also can encourage a sense of lack of investment in the group because of decreased or unseen non-verbal cues. From the telecommunication facilitator's viewpoint, without full visual feedback in the moment, it is difficult to determine if low participation is a sign of disengagement, distraction, rapt attention, or uniform agreement.

Therefore, despite the wide range in telecommunication options, collaborators must still address fundamental communication principles for optimal functioning. It is useful to keep in mind that the processes of how meetings are facilitated are more closely related to success of a project than variables about the task itself (O'Sullivan et al. 2010). Therefore, knowing how to conduct effective conferences via telecommunication is critical. We propose 12 tips to enhance telecommunication facilitation skills, using Tuckman's framework of group process to structure the moment-to-moment work before, during, and after a teleconference (Tuckman & Jensen 1977). For the purposes of this article, we will define

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"teleconference" as a conference call, currently the most common form of synchronous telecommunication. However, all these tips can indeed apply to any synchronous meeting, regardless of whether telecommunication technologies of any sort are used; our goal is to outline particular issues that apply regardless of teleconference platform.

Formation

Formation is the first stage of group process, a stage that must be considered even in a venue such as a teleconference. Though quite challenging to achieve, cohesion and trust are highly important in developing effective virtual teams (Powell et al. 2004). The degree of sociability among team members, predictability of process, and enthusiasm enhance formation of trust (Martins et al. 2004)

Tip 1

Determine the viability of using teleconferencing for your project

Two important questions to answer when making the decision to hold teleconferences involve goals and membership.

Goals of initial meetings, whether in person or by teleconference, often include introducing group members, allowing for dialog, and exchanging ideas. If the goal is primarily unilateral dissemination of information, one may consider other means of communicating, for example, sending e-mail or posting information on a common site, such as a wiki or blog. Conversely, if undivided attention from all group members is necessary, teleconferencing may be suboptimal because of the multitasking that often occurs. Some projects may need to begin face to face in order to agree upon goals and process and to insure equal representation; successfully launched, these groups may then live on through teleconferences. In other instances, initiation of groups through teleconferencing can be successful but usually incorporate previous relationships between at least some of the participants. Dispersed teams tend to have more of a task focus than a social focus, though over time the social focus can develop (Powell et al. 2004).

The process of selecting participants for a teleconference may require careful consideration. With clearly defined working groups, who to include on a teleconference is sometimes apparent from the outset. On the other hand, the process of selection may occasionally require strategic planning to insure appropriate representation of stakeholders, specialists, etc. Size does matter: a very large group (for example, greater than about 12) increases the challenge of facilitating a teleconference; in that instance, it may be helpful to convene subgroups of a larger group, with subsequent meetings of representatives of these subgroups.

Facilitators of these meetings must attend to both the content and the process of the teleconference. As with any group, eliciting contributions from all members and subgroups may assist with cohesion and distributed ownership of the project (Westberg & Jason 1996; Schwarz 2002). If there is a necessary outcome by the end of the conference, the facilitator must make that explicit and deftly direct the group toward a decision without being too heavy handed or agenda driven.

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Tip 2

Convene the group

Even with the enhanced flexibility of teleconferences, determining the time that most or all group members can participate is often very challenging. Using Internet-based scheduling formats (such as Doodle® or Meeting Wizard) can be handy; for projects on shoestring budgets, a number of free telephone conference services exist (consider examples at http://www.geekersmagazine.com/best-free-online-conference-call-services.html). The potential logistic difficulties of convening participants across various time zones must be considered.

For alternative formats (e.g., web conferencing), potential participants will occasionally require technical orientation. Some additional functionality with advanced formats wherein participants can share and edit applications in real time (for example, Google documents, GoToMeeting®) can enhance the conference experience; however, it may require group members to pilot test and troubleshoot potential technical problems in advance (see Tip 5).

Setting group rules and norms

This phase of group process involves setting of ground rules and structure, both implicit and explicit, by which the group is to function.

Tip 3

Clarify the goals and values of the project with the group

Decisions to collaborate on a project must take into account prior preparation: most groups will need to clarify roles, motivations, values, and beliefs. For research projects, definitions of data and methodology must be discussed and agreed upon prior to commencing (O'Sullivan et al. 2010). A well-defined, goal-oriented project with a clear timeline (for example, planning a workshop or annual meeting) will not necessarily need explicit framing in this early phase, but this step is critical for most other *de novo* groups.

It is helpful for a group to identify interim benchmarks and a common definition for when it has reached its goals. In ongoing groups (board and committee meetings, for example), goals and values may shift with changes in leadership or member turnover; in these cases, along with revisiting cohesion and trust (Tip 1), reorienting the group to another visioning phase will be important (Collins & Porras 1996).

Tip 4

Distribute a detailed, timed agenda in advance of the teleconference

To help achieve as much focus for the teleconference as possible, it is most helpful to set a clear goal for every teleconference, whether it is a working meeting, brainstorming session, etc., and whether Internet access or printouts will be

required for participation (see Tip 10). Asking participants to review an agenda that includes anticipated time allocations at the outset will focus discussion and allow for modifications in case anyone has specific additions for the agenda or needs to communicate specific time needs. The beginning of each teleconference can be reserved for check-ins about these additions or other distractions that may affect a participant's behavior on the call, to maximize what the group can accomplish. Naming specific times for reports from participants who have previously accepted project responsibilities also sets up the expectation for accountability in the group.

Tip 5

Devise a process for anticipating and managing technical problems

Distance learners require support when using technology (Gibson 2000), and in the same way, teleconference participants can fall prey to fundamental technical issues that can prevent useful work or prevent the teleconference from occurring at all. The pre-set agenda can include teleconference participation information (phone number, log-in code, etc.) and anticipatory solutions to common technical issues. Facilitators of conference calls requiring a log-in code should be prompt: for some teleconference systems, absence of a facilitator necessitates that all other participants remain on hold.

For unanticipated problems, it can be helpful to develop a back-up plan for contacting participants, for example, a "phone tree" or e-mail contact chain if a last-minute reschedule or change in number must occur. Additionally, an identified technical support point person (who may or may not be part of the teleconference group) could assist with technological questions on or between teleconferences (Mark et al. 1999).

Tip 6

Attend explicitly to speaking etiquette

The teleconference facilitator must track participants' presence and level of engagement, and, if necessary, direct questions to people with expertise on the teleconference (Mark et al. 1999). Some potentially useful specific ground rules, particularly for teleconferences with more than five or six participants, might include:

- Participants introduce themselves each time they speak, unless the participants know each other well and can easily distinguish each other's voices.
- The facilitator acknowledges explicitly who is present on the teleconference, tracks who is expected to join, and makes introductions to participants who may not have known each other previously.
- The facilitator checks periodically to allow late arrivals to introduce themselves—not too infrequently, but not too often—for example, introduction of call members 5 min into

the call, with periodic time-outs during the call to make space for latecomers.
- The group agrees on a defined period of silence—for example, 5 seconds—for responses, objections, etc., and develops a common strategy for interpreting silence. One suggestion is that the facilitator can state, "I take silence as agreement" (Cramton 2001).

Tip 7

Attend explicitly to physical, aural, and interactive considerations on the teleconference

It is important to achieve a common understanding of the environment of the teleconference. Poor connectivity can scuttle the most brilliant work. The use of a speakerphone, while convenient for a caller to be hands-free, can also pick up ambient noise that can distract other participants. Encouraging participants to use a mute button, when available, can reduce this noise. Sometimes when a participant places a group on hold, music (or worse, advertisements) can intervene.

Because of the temptation for participants to perform other tasks while teleconferencing, it can be helpful to address the acceptability of multitasking. It is important to develop a sense of boundaries on teleconferences, since the absence of physical cues may encourage distractions (Wasson 2004). Increasing interactivity between participants on the call can avert the risk of inadequate meeting engagement. However, multitasking can be very useful if appropriately harnessed on a teleconference; for example, participants can enhance the group's collective experience by conducting concurrent literature searches (see Tip 10).

In a related vein, web conferencing can enable additional functions such as offline/cross-conversations, online polling, sharing desktops, and video. This environment can be interpreted as enriched by some and distracting by others; it will enhance group function to address these enrichments specifically. Because secret cross-conversations can either be facilitative or act at cross-purposes to group function, setting ground rules to bring the content of cross-conversations transparently to the group can be helpful.

Tip 8

Be inclusive on the teleconference

An important principle of basic group facilitation is to include the contributions of all members of the group to develop distributed ownership. An explicit ground rule can remind participants that everyone's input is important. This rule can be reinforced in several ways. Various participants can give reports on aspects of a project, so that the facilitator does not speak all the time. The facilitator can check in with all participants during discussions to insure elicitation of all relevant opinions. Specifically asking participants who have participated less often to contribute can help with inclusion (and can provide data as to whether quieter individuals are engaged). On teleconferences involving many participants,

the facilitator can keep e-mail open during the call to add the voice of those who are more introverted or cannot get in.

In a "blended" meeting, in which some people sit face to face in a common room while others telecommunicate, it is common, and undesirable, for a gathered assemblage to ignore off-site voices. The facilitator must track the presence of teleconferenced members and actively seek their input; all in-person group members can help with that task. The positioning of the speakerphone/microphone is crucial, since more distant or softer-voiced in-person participants may not be detected by remote members. If the microphone is portable, it could be used as a kind of "talking stick." If off-site participants have not participated for some time, the facilitator can repeat questions, summarize points, and elicit opinions for their benefit and inclusion. It can also be helpful to establish an aural method by which an off-site participant can signal readiness to offer a discussion point (quick throat clearing, perhaps very briefly pressing a button on a touch-tone keypad).

Conflict/differentiation/feedback

A necessary stage of group process, "storming" can allow a group to evaluate and integrate its intra-group differences for optimal function. A critical skill in this stage is to recognize conflict on a call when it occurs and to determine how to handle it.

Tip 9

Choose to handle conflict either online or offline

It can be helpful to determine the advantages and challenges of resolving conflict in real time or remotely. In-group discussion and feedback can be very effective if the group is cohesive, participants are active and open, and the group norms value honest delivery and non-defensive receipt of feedback. However, specific call-outs can be uncomfortable and engender discord. To decrease the pressure on the facilitator, specific group members can be recruited to take on certain subtasks of a teleconference, for example, introduce a delicate topic, or lead a discussion if the convener has a potential conflict of interest. Individual between-conference check-ins may be necessary if a group member is often absent or minimally participative on teleconferences. Finally, the group may need to revisit how to address ongoing clarification, development of trust, and how to deliver feedback, along with agreed-upon common goals (O'Sullivan et al. 2010).

Performance and outcomes

Once the team has addressed the stages of formation, establishment of standards, and means of expressing difference, it is ready to move forward with effective work.

Tip 10

Use common documents and resources effectively

Real-time collaborative editing on co-created documents is widespread; thanks to cloud-based servers such as Dropbox,

Google Docs, or other multimedia conferencing sites. Therefore, clear parameters regarding version control are highly important. The most recent versions of electronic documents should be clearly designated by date, version number, and/or editors' initials. Cloud-based servers, wikis, or common web spaces can act as repository for these documents for convenient access; alternatively, a very recent e-mail or attachment/addendum to a teleconference agenda that contains the documents under consideration can be helpful. Placing page numbers and line numbers on documents will facilitate discussion during teleconferences. In addition, during a teleconference, it is useful to know the resources available to the group, for example, e-mail availability, or ability to do Internet or literature searches in real time.

Tip 11

Identify next steps and accountability

To insure that a project moves forward, it is often desirable to conclude a teleconference by summarizing action steps, identifying ongoing commitments and resources and naming point people to accomplish which tasks, by what deadline, and what consequences can occur if deadlines are not met. An additional important next step is to set up subsequent teleconferences and determining if it is viable or desirable to convene an in-person meeting.

Tip 12

Keep minutes of the conference

Minutes (or a running document) are critical for all meetings. Fostering an information-sharing culture has been shown to be effective in the function of virtual teams (Powell et al. 2004). Despite the best intentions and skill of conference facilitators, participants often wander away during phone calls; minutes also can update participants who are unable to attend the call. As with a well-detailed agenda, minutes also represent objective criteria upon which the team can rely for accountability, especially if action items and next steps are clearly documented, with lists of deadlines and ramifications if work agreements are not met. Finally, minutes can help prevent groups from unnecessary repetition of discussions about already-reached decisions. The facilitator can choose to take minutes, but having another minute taker may assist with corroboration and accuracy of details. Finally, it is most helpful to highlight action items and have a name and completion date associated with each item (see Tip 11); this list can comprise part of the agenda for the next meeting.

Conclusion

To conduct our work, we rely increasingly on communication across geographical sites. While we recognize that there are many formats for that communication, the ultimate goal of most of those opportunities is to result in products of many different kinds, including curricula, committee projects, and publications (in fact, we produced this document entirely

through teleconferencing). Approaching communication from the perspective of group process provides a method of organizing guidelines so that these tips tangibly benefit groups in accomplishing their work. Importantly, while these tips have focused on the most basic method of virtual communication, the teleconference, they also apply to the wide array of available telecommunication methods as well as to meetings that lack technological presence. We believe that by deliberately practicing and implementing these guidelines, educators can build relationships with remote colleagues, produce work more efficiently, and potentially save time and money.

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