



## **Conference Calls Made Easy**

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by Dr Penny Pullan

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**Penny Pullan:** My name is Penny Pullan. I suppose I got into working on remote projects in 2000. I was working on European projects at the time. Can you all hear me or do I need to lurk behind the lectern? No? Okay. I was working on European projects: think three different cities in one week - rushing all around the place like a headless chicken! But projects were happening; there were lots of face to face meetings with stakeholders and project teams.

All of a sudden, the part of the organization that I was in went global. We all had to work globally. We had big, worldwide projects coming along, such as globalising business processes and implementing SAP. One of the senior managers picked me out and said, "Penny, we know you're interested in making projects work and getting groups working. We need to know how to do this remotely. We're not going to be able to do three cities a week when it's Singapore, Sydney and New York, and we live in the UK. We need to think about how to make this work." So I spent about a month finding out what worked already - looking outside and bringing recommendations together.

But then September the 11<sup>th</sup> happened. Travel was cut completely. Do you remember that? International air travel just seemed to stop. And we needed to use all of the tools I'd discovered. We found some things worked and there were some things we needed to tweak. Gradually we got quite used to doing global projects. Conference calls were key. Video conferences are fine, but, if you have to get up in the middle of the night because it's your turn to be up, you don't want to drive to the office and sit in a cold video conference suite. Actually, just picking up the phone and talking in your pajamas is actually a lot better! The alternative is to use webinars. But if you have firewalls and different companies involved, it can get very complicated.

So that was how I started working on global projects. A couple of years later, a director asked me to run a global programme with the UN, governments in West Africa and companies across the confectionery industry. It was focused on improving child labour on cocoa farms. Because the team included people from all over the world, the work

was done predominantly by conference call; certainly once we had got to know each other. So this can work. There are things that I have learned, which I would like to share with you today.

I now work as an independent. I own a consultancy: Making Projects Work Ltd. Earlier this year, I experienced a flood of project managers saying to me, “What can we do about remote working? Conference calls are not working for us.” So I surveyed people to find out how things were going. I ended up setting up [www.conferencecallsmadeeasy.com](http://www.conferencecallsmadeeasy.com), because conference calls can be an awful lot easier and more effective than they usually are at.

First of all, why does it matter? There are many reasons why it matters. But right now, it is the time when I invite you to stand up: Stand up please (if you can). If you take part in conference calls at all, say, at least one a year, please stay standing. Anybody else, please sit down. [One or two people few sit down.] If you take part in conference calls for less than one a week please sit down. Less than one a week. So you sometimes do conference calls. [About half the audience sits down.] Okay. If you do five conference calls a week or more, please stay standing. Everybody else, please sit down. [All but two sit down.] Okay. Now, I’ve found project managers who do 10, 11 or 12. May I ask you how many calls a week you attend on average?

**Participant:** Probably half a dozen.

**Penny Pullan:** Half a dozen. Thank you very much. Please sit down. The pharmaceutical industry seems to be one where they have 11, 12 or more conference calls a week. It matters, doesn’t it?

There’s the cost of physical travel, not to mention all that time taken. What about the salary and benefits that your company is paying while you’re just sitting on an aeroplane? What about the drain, the hassle and the stress of travelling to travel to meetings, and the effect on the environment? So how sustainable is travelling? We

know it's not, especially not three cities a week, with lots of people travelling around all the time. It certainly doesn't help your work-life balance to be sitting in a room like this late on a Friday evening when you're about to fly long haul:



Just one example: one of my new clients is spending thousands of pounds every single day just sending people to India to get their projects engineers to work on their remote projects. They haven't been able to make conference calls work well as yet. So they are spending a fortune. But you may be sitting there thinking, "Well I don't fly, so I'm okay." But actually, how sustainable is this – travelling to meetings all the time by car?



We need to look at different ways of working.

On the other hand, looking at conference calls, how sustainable is falling asleep on your computer? When you've got somebody this disengaged from what's happening, and up late at night, despite their cup of coffee? In this picture, the poor lady has gone to sleep:



And just in case you think it's only lady project managers that disengage in this way, here's a picture of a male project manager for you:



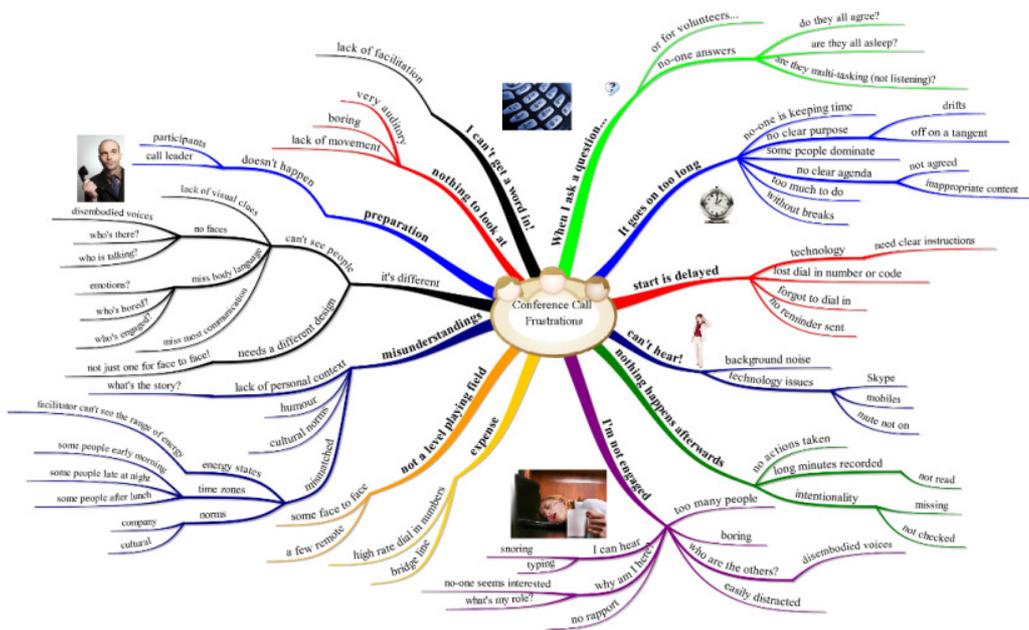
So conference calls look like a really good solution, but there are some issues.

How many issues are there, I thought? I came up with quite a few on my own. I thought that, rather than just using my own experience, it would be good to talk to project managers and see what they thought. So I surveyed people. The survey is still out there if you would like to take part. The survey is at:

<http://spreadsheets.google.com/viewform?key=pec1X-r7WFgK6kGn10T6ZVw&email=true>

My survey came back with nearly 101 issues! Here they are:

## Conference Calls Made Easy – APM Conference Presentation



You've can see them all up there. There's a plethora of issues out there with conference calls. But the good news is that all of these issues have solutions. Unfortunately, in the limited time we've got today, I'm not going to be able to cover them all. But I will come back in a short while to open this talk up to you; you'll be able to ask about your issues that you'd like ideas for solving.

So there are lots and lots of issues. I think is really important is to think about how can we really get things done. There are twelve crucial questions to ask well before you're going to have a remote meeting, a conference call or a video conference. Why crucial? Because these will give you clues as to whether or not you're likely to succeed. There are so many different variables at play when you're meeting people in a remote way. Let's look at some of them.

### 1. Is success absolutely critical for this meeting? If we don't meet our objectives this time, we have a lot to lose.

The first crucial question is, "Is success absolutely critical for your meeting?" So, if you have the meeting and you don't meet your objectives, you have an awful lot to lose. And

here I mean losing big things: e.g. your company is likely to go out of business if you don't succeed. If the impact of not being successful is enormous, you probably want to think about meeting face to face.

## **2. Do we need to achieve our goals urgently? Time is really of the essence. Any delay is unacceptable**

Number 2 tackles this myth: “A conference call will help us get something sorted very quickly.” The issue with conference calls is that you can only really work very effectively for short amounts of time – maybe one hour or one and a half. Whereas, if you can get people together face to face, you can spend two or three days in a room and get things sorted quickly. If you want to do the same work in a conference call, and you want to be effective, you want to look at doing a maximum of one and a half hours at a time. This might mean two sessions a day for a few weeks, as opposed to a few days.

## **3. Is it critical that we share a very high level of trust among team members?**



So, the question here is, “Is it critical to achieve what you need to do in this remote meeting?” For this you need to share a very high level of trust, because trust and commitment lie beneath actions happening. If there isn't trust, or not enough trust, is it worth going ahead with the remote meeting? Will you actually achieve your objective?

## **4. Will our meeting need really in-depth conversations so we can take well-informed decisions and reach agreement?**

In your meeting, do you need to have a lot of really in depth conversations? Do you

need to grapple with a lot of difficult issues? These sorts of things really do work better face to face.

**5. Are we likely to have difficult discussions, which may cause conflict or evoke strong emotions?**



Are there going to be very difficult discussions? Like that man up there? If you had him on the other end of the phone on the other side of the world, you wouldn't have a hope of dealing with him properly in a group conference call. Here, a one to one call or face to face meeting is required to sort his issues out.

**6. Do we really need to tap into everyone's enthusiasm and energy to achieve our goals?**



Do you really need to tap into people's enthusiasm and energy? This person is not very engaged. There are ways that you can deal with this and make people more engaged, but, if your meeting is really crucial, think about this carefully.

### **7. Will our meeting be mostly creative brainstorming and problem solving?**

The environment, when you need to be creative, is quite crucial. Being on a phone isn't necessarily the best place to do brainstorming and creativity. So aspects such as the visioning part of a program or project is probably best done face to face, where you can build up the trust and get to know people. Whereas, later on, when you're reviewing how things have gone and meetings are more predictable, calls are much easier and work better.

### **8. Will splitting our meeting into a series of short chunks (1 – 1.5 hours) ruin it?**

People keep trying to do conference calls that last a long time. I've heard of people having to dial in to a face to face meeting so they had to sit on the phone all day! It really doesn't work. It's not effective. If you want people to be engaged and involved, you need to keep the conference calls down to an hour, to an hour and a half maximum. It might be that you've got a big meeting. In this case, chopping it up might cause problems for you.

### **9. Will we have to challenge assumptions, clarify expectations and test understanding to succeed?**

Do you need to do a lot of challenging different people's assumptions, bringing assumptions out, checking expectations, testing understanding and so on? Is that going to form a major part of your meeting?

### **10. Do we represent a variety of cultures and time zones?**



You might notice the person in England there (yes it's me!) This is a whole group of facilitators who looked at how to make remote working more effective. We were researching the use of story (narrative forms) as opposed to just stating things very blandly, and investigating whether that would be more engaging and effective.

You can see that we drew up a map of where we were based, all around the world. This is a very helpful way of keeping in mind all the people on the call. Unfortunately, two of us, me in the UK and John in the Netherlands, had to be on the calls very late at night. So we were almost falling asleep at eleven (or twelve!) o'clock at night whilst the people in Asia and Australia were getting up and having their breakfast. So, when you have a mixture of cultures and a mixture of time zones, it does make it a bit more difficult. You need to think about how you're going to handle that.

**11. Do some of us have less access to or comfort with conference call technology?**



Don't laugh! There are some people who find coping with conference call technology, typing in codes and hashes and so on, rather complicated. If you add in video conferencing or webinars, you just multiply the issues. If there are people who are going to be in your meeting who have issues, sort them out beforehand. Give them support and training if necessary.

**12. Are the costs of failing to achieve our objectives far higher than the costs of bringing all of us together face to face?**

This is related to the first question. What are the costs if we don't meet our objectives? And are they much bigger than all the costs of bringing people together face to face?

If all the answers to all those questions are yes, just forget it. Don't use a conference call. Meet face to face.

However, you may well find that some of the answers are yes and others are no. And if one or two of those answers are yes, those are the things to focus on and you may well be able to go ahead and have your call. But remember that calls can work really well

sometimes and in other situations they don't work well at all. Now you're warned!

Now I'm saying: "Over to you!" There are so many different issues. Rather than picking a few at random, I would much rather find out which ones are important to you and answer those. So, who would like to ask a question on one of these issues with remote meetings?

**Participant:** In a face to face meeting, it's fairly easy to see where peoples' attention is going and a video conference call, the same thing happens. But I feel really in a conference call, people go away from the point, all the time.

**Penny Pullan:** So you are asking about when people go away from the point? Okay *mentally* go away from the point. Okay. One thing that I think is quite important is to structure your calls and have a facilitator – somebody who actually has the role of facilitating the call and making sure that you stick to the point. So something that I do when I have face to face meetings is this: I have a poster like this up on the wall, [it's our meeting start up template.] What are we here to do? We're going to focus on really effective conference calls. And that's the point. In my face to face meetings I might give people coloured cards. And if I or anybody else starts drifting off the point, people can lift up a yellow card. But in a conference call you can't see those signs.

So one thing, have a facilitator, nominate a facilitator role. Discuss at the beginning of the call what the point is.

I have some cards with all of these points that actually you could take if you like as you go. [People reading this afterwards can receive a card through the post by signing up at <http://www.makingprojectswork.co.uk/Default.aspx?tabid=966> ] Go through all of those points at the start of your call. Make sure everybody is clear on what the point is. By the point I don't mean a long paragraph. It's probably four to ten words, covering 'what are we trying to do'. So the facilitator needs to be the person who is charged to achieve that. Their whole role is to keep the meeting to that point and to make sure that the objectives are achieved. Okay, thank you.

**Participant:** I would like to relate the conference call message you've got to the project life cycle. Where do you think it's appropriate to use conference calls in doing projects? Because they seem quite general points that you've made today.

**Penny Pullan:** Yes, very good question. So how does this relate to the project life cycle? I have known people who have done the very start of a project by conference call - the visioning part where you're setting everything all up, where you're dealing with an awful lot of uncertainty up front. I would say that's the best part of your project to get people together face to face because you have so much uncertainty and you haven't yet built up much trust and commitment. By having time together face to face up front, later on, you can actually use conference calls really effectively because you already know each other. You have trust and commitment. You know what people's voices sound like. And you know a little bit more about their characters. So things like lessons learned, review meetings. Once you've got the top level risks, they work too: going through, checking our risks, how are we going, have more been identified? and so on. Those sort of meetings work very well.

In extremis, if you have no way of travelling, you can do the lot remotely, but it is much harder and you need to think very carefully. How can we build relationships? Maybe we need to get people to work together and have a lot of one to one telephone calls and get to know each other if we can't meet face to face.

**Participant:** The organization I work with has been a big proponent of using teleconferences for probably far too long. And I spend days in teleconferences. Lovely experience! But I think we have a problem with teleconferences: you don't actually see the person. And at the moment I don't think there's a viable video conferencing on webcam option out there. Certainly large organizations can engage provide video equipment and services. However, there's nothing out there in the market that allows that lightweight visual interaction I think. That's part of the problem especially as there are more and more consultancies working with smaller companies especially in this credit crunch as well. There's nothing viable out there certainly in what we've seen. And

also small companies tend not to have facilities or even the money to start to engage this video conferencing service.

**Penny Pullan:** It's interesting. Actually I would say video conferencing isn't necessarily the answer because, although you can see people, it's not the same. Initially in the big company I was working in, we all started using video conferencing. However, we gradually fell back to conference calls because they're so much easier to set up. You can be in a car or at home. You don't have to be stuck at a screen in the office! So that's one thing. But you do need to introduce some sort of visual stimulus. It doesn't have to be a real-time video of people's faces. It could be photographs of everybody's faces like the one I showed you a little while ago.

**Participant:** I had that same experience with a colleague in the States. For some reason I assumed this person was a gung-ho Texan. It turned out that he was from New England and had never touched a gun in this life!

**Penny Pullan:** At one point, we had cartoons made of the various different people in the team. So how can you actually bring these remote people to life? They're disembodied voices on the phone. How can we actually give them some way even if it's not their current video picture, how can we embody them some way? And it's easy: if you have photographs of people, you can look at the picture as you're speaking to them. I found that very helpful.

One more question.

**Participant:** We are quite new to conference calling. And my husband is very used to doing them. And it works quite well for him. I find it very hard because people turn up late. A lot of times, they can't find the code. And it all interrupts because people get in late, have to go early, are not very disciplined. Is there a way you can educate quite quickly in conference calling?

**Penny Pullan:** Well, that's something my company does, educating people who haven't used calls much before as well as improving the effectiveness of calls for people who do ten calls a week.

You're describing various different issues: you've got people not turning up on time and people leaving late and not knowing the code and so on. I have just one key thing for you. One of my clients, in a major utility, said to me, "We never realized you have to take conference calls more seriously than other meetings. We all assume you can just pick the phone up." But no. It's not like that.

Preparation is much more important than a normal meeting. What you do during the meeting to keep people engaged and to keep it effective is much more important than a normal meeting. Because, if you have people drifting off to their email, you've lost them for good. What you do afterwards to make sure actions happen again is even more important. So it's not the easy option that many people assume it must be. You can't just relax and do everything very informally.

**Participant:** Thank you very much.

**Penny Pullan:** There are a couple of things as you go out. If you like, there's a reminder of this card graphically or text, of all of the things to think about at the beginning.

[END RECORDING 25.50]

The 12 crucial questions were developed from a checklist developed jointly with Nancy Settle-Murphy of Guided Insights Inc. in the USA.

For a free master class and a special checklist based on these questions, as well as further support for Conference Calls Made Easy, sign up at [www.conferencecallsmadeeasy.com](http://www.conferencecallsmadeeasy.com).

If you would like to receive our meeting start up card sent to your door, please sign up here: <http://www.makingprojectswork.co.uk/Default.aspx?tabid=966>