

The Perfect Conference Call Checklist

Here's a step by step checklist for the Perfect Conference Call.

Preparing for Your Conference Call

- ☐ Create an agenda (Most crucial part)
- ☐ Determine who is running the call (Facilitator)
- ☐ Determine who is taking notes/minute taker (Minute-Taker)

Scheduling Your Conference Call

- ☐ Propose and set a time for key attendees
- ☐ Determine your teleconference software and it's features

Hosting Your Conference Call

- ☐ Send out a meeting notice w/crucial information
- ☐ Determine if attendees have met before
 - ☐ Introduce appropriately
- ☐ Confirm names, roles and time zones
- ☐ Go through agenda
- ☐ Ask questions to solicit feedback
- ☐ Clarify CTA (Call-to-action)

Post-Conference Call Steps

- ☐ Determine if follow-up call is needed
- ☐ Schedule follow-up call (can be done on the call or via email)
- ☐ Minute-taker sends meeting notes and CTA items to group