

Operator Assisted Call Best Practices

When you're planning a conference, leave nothing to chance. Our Best Practices guide is designed to help ensure that nothing comes as a surprise. If you're aware of all the factors listed here, you're well on the way a successful Event.

THE VENUE

Here are a few questions to help determine your venue.

- › Can the room accommodate the set and the audience?
- › Is there adequate local hotel accommodation for all your delegates?
- › If you are hosting a live video webcast check access for trucks / vans.
- › Is there a TBU (telephone balancing unit) supplied in the room. This is essential if hosting a live conference call.
- › If you are hosting this in house, please book the room and inform the AV team if appropriate

THE ROOM

- › Check size, height and shape of the room
- › Check access for set-up and exit
- › Check access for audience inc wheelchairs and check emergency exits
- › Check screening and blackout
- › Decide room layout & comfort (heating etc)
- › What will be going on next door?
- › Any overspill rooms?

SOUND

- › Just voice or full music system?
- › How many microphones?
- › Lectern, floor stands or radio mics?
- › Delay lines for long rooms?
- › Mics for questions from the floor?

AUDIENCE VOTING SYSTEMS

- › How many handsets?

THE CONFERENCE CALL

- › Once you have decided your date, time and how many people will join your call, you then need to schedule the call with us.
- › Either send in an Event Booking form or contact your Event Manager
- › If you do not have a booking form, you will be asked the following:
 - › Company Name:
 - › Title of the call:
 - › Speaker's Name:
 - › Conference Dates:
 - › Start Time:
 - › Pre Conference:

- › Length:
- › Number of participants dialing in:
- › Language:
- › Access numbers for participants (locations)
- › Location of Speaker:
- › Communication line:
- › Assistance on site:
- › A copy of the recording: If yes, which format:
- › Replay service: If yes, how many days:
- › Web Conferencing to be added?
- › Transcription, turnaround time:
- › Question & Answer Session:
- › Participant list (name, company):
- › Verification (who's allowed on the call): Employees only for example
- › Q&A web Controls:

If you are unsure of any of the services above, please contact your Account Manager.

- › You will then receive an email confirmation of your booking. Please check these details to ensure everything is as you've requested.
- › To avoid cancellation charges, please call us at least 24 hours prior to your conference.

THEN TELL THE PARTICIPANTS

- › Date
- › Start time with time zone
- › Length of conference
- › Agenda
- › Conference dial in number
- › To help ensure your conference begins in a timely manner, please ask all participants to dial in 10 to 15 minutes prior to the scheduled start time.

REHEARSALS

- › Have you allowed time?
- › Have you informed everybody?
- › Printing hand-outs from notes?
- › Have you booked a test conference call?

ADVICE FOR THE PARTICIPANTS

- › Before joining the call, consider the surroundings. For example, static or crowd noises in the background of a call made from a mobile phone will seriously hinder the meeting's productivity.
- › Dial into the conference 5 – 10 minutes before it's due to start to ensure you are ready.
- › Do not put the line on hold. Many offices have music on hold and the call is "interrupted" by the music. If you have to leave the call, hang up and call back as soon as you can rejoin.
- › Always identify yourself by name before you start speaking during Q&A if you are joining the service where the Operator has not announced your name.
- › It's advised that all participants mute their phone whilst they are not speaking. For operator assistance at any time during the conference, the participants can press *0 on their telephone keypad to connect to our Customer Service department who will assist in isolating any issues.
- › Listen for other environmental noise such as fans, open windows, pens clicking, and papers shuffling that might disturb your audio quality.

MUTE BUTTON TIPS:

- › Use when your location is not talking.
- › Use when shuffling papers, sneezing or coughing, or when making other distracting noises.
- › Use during side conversations.
- › You must take the mute off if you wish to press *1 to ask a question otherwise the signal will not reach the equipment.

ON THE DAY

BEFORE THE CALL

- › Please arrive to the room in plenty of time. You will need to be connected between 15 and 30 minutes prior to the start time. Whether our Event Operator is dialling out to you or your location is due to dial into in the meeting will be determined at the time of booking your call.
- › If you are using Q&A Web Controls, please log on during the set up time. Use the confirmation details that are printed at the bottom of the confirmation for that particular call. Please remember, this shows the audio connections only and no presentation etc can be shown through this.
- › Moderator & Speakers join Pre-Conference during the 30 minutes prior to the start time the Event Operator will have a pre conference with you or your in house AV team to run through the procedure and your requirements. Example. Q&A, if you would like the operator to read out the script etc. The pre conference would run like this: Good day Mr/Mrs XXX. My name is XXX and I will be assisting you with your conference today. At this time we have X participants on hold in the main conference and we are X minutes away from our scheduled start time. I would like to go over today's opening script with you if I may. And to whom will I turn the call over to after the introduction?
 - Do you know approximately how long today's presentation will last?
 - When you are ready for the Q&A session, could you give me a clear verbal cue?
 - Is there a time limit on the Q&A session?
 - After the Q&A session should I pass the call over to you Mr/Ms XXXX (or proceed with the voting session if taking place)?
 - After the voting session, shall I turn the call back over to you, Mr/Ms XXXX?
 - Would you like to conduct a private conference after the main call has ended? (Post Conference)
 - I would like to take a moment to check the quality of your lines. Mr/Ms XX can you hear me clearly?
 - The following would then be completed if you are not in a live auditorium environment. "I will be transferring you into the main conference in a moment. Please stand by silently, as everything that you say from this point will be heard in the main conference. I will now open the call and hand over to you."
- › Participants then join conference on hold with music
- › When ready Moderator/Speakers are transferred into main conference
- › Music is switched off and recording is started

DURING THE CALL

- › Operator to introduce the call with our standard script unless otherwise stated.
- › The call would start like this: Please standby, we are about to begin.
 - Good afternoon/morning Ladies & Gentlemen and welcome to today's XXX conference call. For your information this conference is being recorded.
 - At this time, I would like to turn the call over to your host today, Mr XXX. Please go ahead Sir.

- › The Moderator to give clear verbal cues when it is time for Q&A and Polling sessions. The Q&A would run like this: Thank-You Mr/Ms XXXX. Ladies & Gentlemen, the Question and Answer session will be conducted electronically.
 - If you would like to ask a question, please press the star (*) or asterisk key, followed by the digit 1 on your telephone keypad. Please ensure that the mute function on your telephone is switched off to allow your signal to reach our equipment.
 - We will take questions in the order received, and will take as many as time permits.
 - If you find that your question has been answered, you may remove yourself from the queue by pressing Star 2.
 - Again, please press *1 to ask a question.
 - We will pause for just a moment to allow everyone to signal.
- › If no questions are asked we will re prompt like this: As a reminder, to ask a question in today's question & answer session, please press *1. Please ensure that the mute function on your telephone is switched off to allow your signal to reach our equipment.
 - Our first question will come from Mr/Ms XXX from company XXX.
 - From (company name), we will take our next question from Mr/Ms XXX.
 - And now we will move to....
 - We will now take a question from...
 - Mr/Ms XXX, from (company name) has our next question.
 - Our final question today will come from....

CLOSING Q&A WITH QUESTIONS STILL IN QUEUE

That will conclude today's question & answer session. I would now like to turn the call back to Mr/Ms XXX for any additional or closing remarks.

NO MORE QUESTIONS

As there are no further questions remaining in the queue that will conclude today's question and answer session. Mr/Ms XXX, I would like to turn the call back over to you for any additional or closing remarks.

- › Operator to conclude the call and transfer moderator/speakers to post conference if required. That will conclude today's conference call. Thank you for your participation Ladies & Gentlemen.

USING THE MICROPHONE

- › Be aware of the microphone placement. This would have been tested for you in the position it is in. If you pick this up from the table you run risk of sound being lost.
- › The microphone can magnify sounds that are normal for a meeting therefore there is no need to speak too loudly.
- › Sometimes when there are several speakers, some may be heard louder than others as the microphone would be set to a standard level. If participants are unable to hear you or you feel you are not coming across loud enough, move closer to the microphone rather than picking it up and moving it closer to you. Getting feedback? Reduce the number of open microphones. Most microphones will have their on/off switch at the base but there is no need to adjust this if you have your own AV team in house. If there are several microphones set up at a top table and only two of you will speak, have the other microphones switched off. Switch off your mobile phone, especially if you will be speaking from the lectern. Leaving your phone on, even if it's switched to silent will only cause feedback. Avoid breathing heavily into the microphone or putting your hand over it during your call. All of these create disruptive noises for your conference.

...AND FINALLY

- › *Don't forget to tell them - "Please switch off your mobile phones!"*

AFTER THE CALL

- ✓ Ancillaries are sent. For example: Recording is processed and made available
- ✓ Participant List is sent