

## Conference Call Etiquette – the do's and don't's of multi-way phone conversations

By Lyndsay Swinton

Conference calls - the curse of every hard working manager. Love or hate them, with today's geographically dispersed teams and travel restrictions, conference call etiquette is a key part of any manager's skill set.

Here are 3 of my favorite transgressions of conference call etiquette...

- a **barking dog** drowning out the key discussion point was bad enough, but then owner started shouting at his pet
- a thirsty caller uses the **hold button** whilst slipping out to get a drink, unaware that hold music starts playing to everyone on the call
- a talkative colleague uses the **mute button** to moan about the call, stopping anyone answering the question just asked by the remote senior manager

Obviously I would discourage all these career limiting behaviors, so what are the do's and don'ts of effective conference call etiquette?

### 14 (+1) Conference Call Tips

**Do** get comfortable with the fact you will be talking in front of a group and receiving no visual cues or feedback.

**Do** use the right phone in a quiet, undisturbed room.

**Don't** use cell phones or phones that pick up background noise. Calling from an open plan office is the equivalent of having a conversation in a nightclub. If you really can't find a quiet room, use the mute button until you are required to speak.

**Do** learn to use the mute button and other phone technology to avoid a Homer Simpson style “Doh” moment. Your intelligent contributions mean nothing if no one can hear them.

**Do** set up the meeting in advance and communicate the dial in number, passcodes and other information. “Spring forward, fall back” is something to keep in mind for your timezone crossing colleagues. Don’t work out time differences on your fingers – check on the internet or even phone a colleague in that country and ask what time it is!

**Do** start the meeting absolutely on time; don’t reward latecomers’ bad behaviour by waiting for them. Take a role call at the start of the meeting, highlighting the missing attendees. Go on, get tough, people will love you for it!

**Do** treat the conference call as if it were a meeting. You know the routine; prepare and circulate an agenda, take notes ya-de-ya-de-ya.

**Do** get each caller to say hello and introduce themselves. Even though you may never meet in person, it’s a good relationship builder and gets the shyest of people to at least say their name.

**Don’t** assume everyone recognises your voice. Unless you are dis-respecting the boss and want to stay incognito, say your name before you speak. This is particularly important for the poor soul taking meeting notes.

**Do** make use of guest speakers. Invite a special or important guest and get them to say a few words at the beginning of the meeting. No one will know they slipped out after five minutes and you’ll get the benefit of undivided attention and best behaviour.

**Don’t** allow the topic to wander. Be an iron fist in a velvet glove – polite but firm if people talk too long or over each other. If your callers are at home sitting in their pyjamas nursing a hot chocolate, be considerate that all they want is to go to bed.

**Do** ask for input by using a person’s name. People will pay more attention to avoid the embarrassment of needing the question repeated.

**Don’t** shuffle papers; scrape chairs, pencil tap, hum or other distracting, noisy activities. It.....drives.....people.....mad!

**Do** close the meeting formally, thanking everybody for their time. That little bit of recognition will make them feel good about talking to you again.

## One final, essential, personal etiquette tip

And that's about it. Apart from one very personal tip.

**Do not sit on a leather chair.** Ever.

The problem is each time you move around, an embarrassing noise is emitted at just the right frequency to carry clearly over the phone.

Either you brazen it out and suffer the comments about your defective digestive system, or sit rigid until the call is over. If you only take one piece of advice make sure it's this - do use fabric covered seats!

**By Lyndsay Swinton**

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## ED Report: April 2015

### Snapshot

My attention must focus heavily on organizing and promoting the 4/23 NACTO Bikeway Design Guide Workshop and the 4/24 Summit, and keeping tabs on legislative activity. Registration is picking up for both April events, but we're still a ways off from selling out. The lull on SB 502 will end soon. My March mini blitz on membership renewals had some success.

### Membership

- **Current membership** totaled 314 as of 3/31. Our highest membership count was 321 members in February 2014. We have over 6000 people on our mailing list but our membership numbers hover at 300. We need to convert readers, facebook likers, and twitter followers to actual paid supporters.
- **Chapter Membership Concept:** Recall that last month we entered into an agreement with UConn Law School's Center for Urban Legal Initiatives to outline the legal and financial issues involved in creating chapter membership options. CULI is to identify the primary considerations by mid April so we can evaluate them and discuss at the members meeting.

<b>Business Member - Premier</b>	1
<b>Business Member - Gold</b>	1
<b>Business Member - Silver</b>	1
<b>Business Member - Bronze</b>	3
<b>Individual</b>	151
<b>Individual - Recurring</b>	32
<b>Family/Household</b>	64
<b>Family/Household - Recurring</b>	16
<b>Supporting</b>	27
<b>Supporting - Recurring</b>	10
<b>Sustaining</b>	5
<b>Student</b>	1
<b>Lifetime</b>	2
<b>Grand Total</b>	<b>314</b>

### Advocacy: Federal Level

- **Action Alert:** There's important activity on at the federal level regarding fed funding for bike/ped transportation.
- **Please read and respond** to the Action Alert I issued on Saturday, 3/28, at the LAB's request. [Action Alert from LAB: Save Biking and Walking Funding for our Communities.](#)
- **National Bike Summit:** I regret that Connecticut was a no-show for the National Bike Summit in March. The LAB asked me several times about our participation. We simply lack the capacity to engage at that level.

## Advocacy: State Level

I am actively promoting SB 502, monitoring and supporting SB 1062.

- **SB 502, AAC Bicycle Safety**—to update the rules on riding as far to right as possible; allow modern infrastructure like two way bike lanes and cycle tracks; address problem re crossing double yellow line to go around cyclists (or anything else).
  - Submitted written testimony and delivered oral testimony; drafted legislative language for amendment to 14-286b (Jan/Feb).
  - Sandy Fry prematurely submitted her own version of legislative language to cosponsors, who provided it to LCO, which copied and pasted the text as it was.
  - SB 502 was adopted as a committee bill, which means the Transportation Committee endorses it as its own. Accordingly, there was a unanimous “joint favorable” vote on it at the committee’s JF meeting. So the bill lives on, rather than “dies in committee.” Senate leadership now needs to put it on the Senate Calendar for a vote.
  - Cosponsor list is growing: Bye, Lemar, McCarthey Vahey, Bumgardner, Lavielle, Dillon, Rosario, Ritter.
  - We (I) need to work with DOT and the chief sponsors of the bill to correct problems with the bill language.
- **SB1062—An Act Providing Continued Funding for DEEP’s Recreational Trails Program.** Amends Conn. Gen. Stat. 23-103. Expands the kinds of things that Rec Trails \$ can be used for. This statute incorporates a reference to a now outdated AASHTO guide (bikeways to conform to 1999 American Association of State Highway Transportation Official's "Guide for the Development of Bicycle Facilities"). This illustrates why it's poor legislative drafting to bind yourself, by statute or regulation, to guidelines that are updated from time to time.
- **State Endorsement of NACTO Guidelines:** I am encouraging CT to adopt NACTO guidelines via administrative policy modeled on the FHWA’s 2013 and 2010 announcements. We support a directive enabling or requiring official state endorsement of NACTO’s Urban Street Design Guide and Urban Bikeway Design Guide, as well as other national design guidance documents related to bicycle and pedestrian facilities, as those documents may be amended from time to time. Delaware’s December 2014 policy memo or FHWA policy could be adapted to legislative language or a DOT policy statement.
- **DEEP**--Attended meeting with DEEP Commissioner and top staff, with enviros
- **CTFastrak**—participated in bus tour with agency heads and other advocates to ribbon cutting on 3/27. CT Fastrak is good for active transportation, so we want to support DOT on this.
- **BPAB**--Promoted Bike Ped Advisory Board’s Annual Report

## DPH Complete Streets Contract

- This is year 2 of a five-year agreement with DPH worth a total of \$69,420 (\$13,884/year), funded by a CDC grant.
- The amended agreement for the current year still has not been executed. It needs to go through DPH Legal and the AG’s Office. DPH Legal is the choke point.
- Our 3/23 **NACTO Bikeway Design Guide workshop** is a feature of our year 2 scope of work. Our scope of work also includes updating **Share the Road materials**. I have this work scheduled for the last half of May and June.
- I completed the mid-year report required for the contract. I received the corresponding financial report to be filed on 3/30. I must complete it for the 2<sup>nd</sup> of two payments to be released. That means we have an Account Receivable of \$6942 to look forward to in April and another \$6942 in July (payment 1 for year 3).
- Simultaneously I need to start planning my scope of work for the next contract year, which begins July 1.

## Apr 12 -- Bike Education, TS 101

- Suffield Schools is renting bike fleet in April for 4 weeks at \$250/week. Now it's urgent to track down Mike Gallagher, who still has the trailer keys from last year.
- 12 registrants now for the TS 101 that Tony Cherolis initiated for Sun. April 12. On his own volition, Tony extended a \$20 registration fee to one individual. Tony is not authorized to make those calls.
- Background: Our cost to run TS 101s is \$500 (\$400 for two instructors (8 hrs each at \$25/hr), and about \$100 in my time to coordinate, publicize, handle registration, etc.)
- Tony has expressed interest in scheduling 3-4 more TS 101s around Hartford/West Hartford. He has noted that the going rate for instructors is 35/hour. We've been paying 25/hr.

## Apr 23 – NACTO Bikeway Design Guide Workshop

- Our 3/23 **NACTO Bikeway Design Guide workshop** for transportation professionals is central to our Year 2 scope of work. It needs to be well attended. It's critical to get state and local government staff there. Thanks to all of you who encouraged your town to send staff.
- Current registration is at 29. I am going to have to promote the heck out of this to get registration up and to get state and local staff to participate.
- I am handling all the event planning logistics for the speaker, registration, payment, marketing, venue, catering.

## Apr 24 -- Summit

- **Board Action Needed: All Bike Walk CT Directors are expected to register for the summit and attend if at all possible. Directors will be needed for check in, taking audience questions, helping with the Members meeting, end of the day clean up, and collecting waivers for the post summit ride.**
- Current registration is 34, including 4 Bike Walk CT Directors (Thank you Laura, Scott, Kevin and Dave). I expect registration to increase when the agenda is released.
- I secured the keynote speaker, DOT Commissioner. I am assembling speakers for panels on complete streets, trails, and enforcement. There is no Summit planning committee to speak of this year.
- Exhibitor opportunities at both events.
- Location, Keeney Memorial Cultural Center, 200 Main Street, Old Wethersfield.

## May 15 -- Bike to Work Day

**Board Action Needed! We should have a Bike to Work Day chair and committee by now** to help organize the Hartford BTW event, secure speaker(s), food, tent, venue permit, coordinate with DEEP, publicity to engage BTW events around the state. Thanks to Laura for starting to take some of this on. But she already has enough on her plate.

I've been getting inquiries from groups around the state on our BTW day plans. Stamford in particular is all pumped up.

## June 6, Sept 27 -- Discover CT Local Rides

- Background: Thanks to Chris Skelly, Kevin Vicha & Scott Gamester who are leading this effort, dates were set fundraiser rides for West Hartford (June 6) and New Britain (Sept 27). Logistics director, Matt Moritz, is under contract with us for \$2530 worth of services.
- We have \$500 in sponsorship proceeds in hand.
- I obtained pro bono artwork from the graphics professional who designed our logo.
- Sponsorship package is complete...We can open a webpage and registration shortly.

- Our 2015 budget did not include revenue or expenses for the Discover CT fundraisers. Planning for them was just getting started when I prepared the budget.
- At our April board meeting we need to vet a budget for at least the June 6 fundraiser, taking into consideration actual versus projected sponsorship proceeds and our financial exposure (commitment to fund the ride coordinator for \$2530).
- My March report stated the need for the MOA with West Hartford to be in place. We must ensure that there are no misunderstandings about roles and designation of proceeds. We can't have any ill-will coming out of this initiative because we failed to debate or articulate who does and gets what.

## Nov 20 -- Annual Dinner & Silent Auction

**Board Action Needed!** We need a board committee and board chair to take on the 2015 Annual Dinner & Silent Auction, which netted \$13,0704 in 2014. The event is scheduled for 11/20 at CCSU. Board work focuses primarily on handling all aspects of the silent auction, heavily promoting ticket sales, proposing a keynote speaker and selecting the menu.

## Share the Road—CCMC/Kohls

As it turned out, the STR event and media campaign planned for 3/27 were not ready for prime time. We need to make sure anyone who represents us at an event like this is well-versed on the bike ped laws and sticks to a pre-determined message. You can imagine the pr train wreck if we let people make it up as they go along. As an alternative, I looked into converting our role to a press event and rally for the bike bill, but there wasn't enough time to pull it together.

Background: We are working very tangentially with CCMC and Go Media on a Share the Road Campaign, funded by a Kohls grant to CCMC. An STR event was planned for Saturday morning Mar 27 in Blue Back Square, West Hartford. A multimedia campaign will follow.

## Financials, Communications, Banking, Mail, Membership Recordkeeping, Plus

- **This is notice that our Exempt Organization 990 return for 2014 return is due by May 15.** I raised important questions about the last return that did not get answered. I'd like the Executive Committee to see that all directors give our 990 filing proper scrutiny this year. This is important.
- **Dept of Labor Statements.** We still need to iron out statements we keep getting from CT DOL and transition our Quickbooks account from a desktop account to an online account. Our chart of accounts is badly in need of some housekeeping too.
- **Quarterly Employment Tax Filings and Reports.** Until recently Bike Walk CT kept no record of our quarterly employment tax filings. I have asked Scott, as Treasurer, to make sure our 941s are timely filed and copies are maintained.
- **We are exempt from sales and use tax.** As a not-for-profit we are exempt from CT sales and use tax. Yet we are paying SUT on payroll processing services. The amount is de minimus, but I have asked Scott to correct this as he can get to it. I expect that we need to provide the vendor (Intuit) with a Cert- 119.
- **Volunteer Needed to Take On Banking, Mail, Correspondence.**
  - It bears repeating that my job expanded dramatically when board/volunteers stopped handling the organization's banking, mail, membership and communications functions.
  - Our mail, banking, membership and correspondence functions need to be handled by a volunteer or director again so I can be freed up to do more high impact work. The problem has been that no one will step forward, and we can't afford admin staff any more.

## Fundraising

I have suggested to Laura that we convene a separate meeting to focus just on fundraising. We have something of a fundraising plan with the multiday ride concept, but we're not acting on it yet.

- **Multiday Ride/"Gamechanging" Fundraiser:**
  - Our strategic business plan calls for a gamechanging fundraiser to keep Bike Walk Connecticut in business.
  - **Board Action Needed! We agreed to pursue a multiday ride. Now it's time to act.**
  - We need to start assembling the business plan and tourism investors now for the 2016 multiday ride so we can submit a competitive proposal for CT Tourism's Marketing Challenge Grant in Nov or Dec. 2015. This multiday ride is the key piece of our "game-changing" fundraising work.
  - We need to be thinking like entrepreneurs, putting together a deal with backers from the tourism and hospitality industries who could benefit financially from such an event. We need to target an audience who is willing to pay for a quality experience.
  - The **Bon Ton Roulet** was reported to net 250K on its fundraiser ride. **Maine's** ride is another good model. **RAGBRAI** is the king of these rides, but that one's 27 years in the making. Still, we should look to RAGBRAI for good ideas to borrow and adapt to our circumstances.
- **Safe Routes to Schools Contract**
  - The current SRTS contract is an 800K, 3-4 year arrangement that was awarded to VN Engineering in 2012 or 2013.
  - Bike Ped groups get the SRTS contract in other states, but obviously, they need to demonstrate the capacity to pull it off. I realize we're not even close at this point.
  - CT's contract will be up for renewal in probably 2017, assuming it gets refunded at the federal level.
  - I've asked Dave for thoughts on what it would take for Bike Walk CT to compete successfully for all or part of the contract. Starting with that end in mind, I would work backwards to determine what staffing capacity we would need to start building now, and develop our fundraising plan in tandem with that objective.
- **Corporate Support**
  - Corporate philanthropy has been on the decline for years, but we should still be forging relationships with key players in CT. Travelers is the only business that has supported us on a regular basis.
  - **We need to develop strong connections with C-level decision makers** and other influential players at Aetna, Cigna, UnitedHealth Group, UTC, Bank of America, The Hartford, Prudential, Voya, Lincoln Financial Group, GE, Anthem, ESPN to name a few.
  - **Patagonia** is a supporter, but we don't take full advantage of that connection. We need a board liaison to monitor Patagonia's grant application dates, propose fundable projects, and complete the application in cooperation with the ED.
- **Individual Support**
  - It's well known in development circles that individuals provide much more financial support to nonprofits than businesses do.
  - We have over 6000 people on our mailing list. And about 300 members.
  - To put it candidly, Connecticut's bike ped community needs to put their money where their mouth is, and at the very least be dues paying members.
  - What can we do to increase our membership numbers? (Chapter concept, bike club/shop liaison concepts, what else?)
- **Connections to Foundations and High Net Worth Individuals**
  - We need to cultivate connections to private foundations and high net worth individuals who care about making CT a better place to bike and walk. Please think about who you know that fits that description.
  - As a point of reference, Directors of another nonprofit I worked for cultivated their connections to the Paul Newman Foundation, a Westport venture capital firm, a family



foundation with strong ties to Pepsi, the Merck Family Foundation, and to Peter Malkin, the “Greenwich real estate baron” who has an ownership interest in the Empire State Building. Malkin also supports CFE’s Transit Oriented Development work, which ties in nicely to our bike ped work. We need to get to those levels of networking.

- **Board Support**

- I would appreciate it if all Directors made a point of keeping their membership in good standing. Please join at the highest level your circumstances permit, and please use the auto-renew feature.
- Please use your influence with your employer, former employer and relevant community groups to join as a business member or sponsor.
- As a point of reference, several directors of another nonprofit I worked for contributed at the \$5000 and \$10,000 level annually. We need to recruit directors who are in the position to support Bike Walk Connecticut operations at that level.

# **Discover CT- 4/3 Update**

# Sponsorships

Goal of \$40,000- \$30,000 BWCT

33 businesses approached already

\$4,000 committed, \$500 received

\$8,000 strong prospects

Still outstanding- Travelers, United, PW+

Declines- Lego, Robinson & Cole, ESPN,  
Filomeno, Blum Shapiro, ProHealth

Any other updates?

# Route Planning

10, 25 and 50 mile routes planned and on Ride with GPS for WH

Team is testing them on 4/11

Kingswood Oxford School is confirmed as starting point

# Other

Memo of understanding in process

Graphic completed free- thanks Kelly

Kelly will update BWCT website and get registration set up by 4/10

Solicitations also underway for food/water donations

Meeting with NB mayors office 4/14

Financial Model for Discover CT- Daily Ride Series			Proposed revised	Proposed-original	2013 DH	2012 DH				
<b>Revenue:</b>										
Sponsorships BWCT			\$15,000							
Sponsorships BWH			\$5,000							
			\$20,000	\$15,000	\$11,500	\$7,000				
Advertising/marketing back to sponsors- 20-30%			\$4,000	\$4,500						
<b>Net sponsorships</b>			<b>\$16,000</b>	<b>\$10,500</b>						
Ticket Sales:										
	Price per rider	Riders								
Early reg- members	\$40	140	5600		Distributio	Ride Cost				
Early reg-nonmembers	\$50	160	8000	Family	5%	\$50	\$25	\$1,250		
Youth (under 18)	\$10	50	500	10	5%	\$25	\$25	\$625		
Day of registration	\$60	150	9000	25	45%	\$50	\$225	\$11,250		
		500	23100	40	30%	\$60	\$150	\$9,000		
				63	15%	\$75	\$75	\$5,625		
							\$500	\$27,750	\$17,685	\$14,485
Other								\$300		
								\$38,250	\$17,985	\$14,485

