

Procedure 7.5

Standards for delivering teleconference trainings

This procedure is for staff who manage teleconference trainings where participants are paying a fee.

They are not intended to cover ThinkTanks, internal meetings or other free services, although some of the standards may be useful.

1. Phone bridge service

The phone-bridge should be a paid service (not freeconference) with a direct arrangement between IRI and the service provider. IRI will set up an approved supplier. As of June 2009 the approved supplier is.....

This is to ensure that we are in direct relationship with a supplier who we can hold responsible for a service they have provided for a fee. Free service providers are under no obligation.

2. Communication to attendees

We should use the most reliable service possible to ensure that attendees have the information required to attend.

Automatic confirmation emails should include the phone number to call.

At least 48 hours prior to the first session of a class an email should be sent using Constant Contact to all attendees reminding them of the information they need for the call. This should be a well formatted professional looking email, preferably with the photo of the presenter, a summary of all class details etc:

This should include clear instructions about what to do if there are problems logging into the bridge at the time of the meeting. (Recommended to email, but if not able to call main line. Remind them that if there are problems the main line may be jammed so email is better)

Late sign-ups should be added to the Constant Contact list, and the joining email can be sent through constant contact directly to just them.

The class list on Constant Contact should be checked the morning of the first call and where there are bounces or unopened emails, personal emails or phone calls are to be made.

3. Checking the bridge

The phone-bridge should be set up so that it can be checked 30 minutes prior to every call, using both moderator and attendee phone numbers. This is intended to allow enough time to contact the company providing the phone-bridge to ensure the number is working.

Only as a last resort, use the Budget Conference emergency phone bridge. This is a reservationless service, and the bridge can be activated by phoning in and using the moderator PIN. On no account give this PIN to anyone, not even the class leader. IRI staff should call in as the moderator to open this bridge if required.

4. Staff availability

Please notify all staff when a teleclass training of this type is scheduled, and ask them to mark it in their calendars. All staff are asked to try to be available for the first 10 minutes for each meeting, and to keep all phone lines free, in case there is a problem. No other phone meetings involving staff should be scheduled for the same time, but of course staff may be traveling or out of the office.

The meeting organizer should make sure all staff have available the call in numbers, including the moderator PIN, and to check their emails around that time in case there is a problem.

There should be at least two staff in the NY office available at the start of these calls.