Policies and Procedures for Submission of ECLE Teleconferences/Webcasts

Trust and Estate Regulations

- All are allowed and encouraged to submit a program for consideration
- Program suggestions should be submitted to Bruce Tannahill at BTannahill@aegonusa.com
- Most programs are identified/chosen based upon current developments, programs presented live at other ABA events, or recent topics of interest
- Speakers: Should be well known in the TE community. Try to avoid submitting various speakers from the same firm or school. Non-Lawyer speakers are OK, given that they are either well-known in the field or have a multitude of practical experience/knowledge on the topic

Real Property Regulations

- All are allowed and encouraged to submit a program for consideration
- Program suggestions should be submitted to Scott Willis at swillis@cfhlaw.com
- Most programs are identified/chosen based upon emerging issues and hot topics. Programs that were well presented and received at live events will also be considered
- Speakers: Committee will look for diversity (in both gender and geography) and will try to avoid various speakers from the same law firm/school and non-lawyers

OBLIGATIONS OF eCLE SPEAKERS

<u>3 HOURS ON THE TELEPHONE:</u>

- 1 hour commitment prior to the program for a planning call (usually the call is 30-40 minutes). Call generally lays framework for the marketing strategy and script. Speakers call into a number to be provided shortly before the call.
  - Due: approximately 1 month before the program.
  - 2 hour commitment to the date and time of the program. Speakers will be called by the technical advisor approximately 20 – 30 minutes prior to the program start time. Together they will (go over last-minute points, housekeeping issues, and to do a sound check We must be able to reach you on a land line phone; cell phones do not have adequate sound quality. Due: day of the program

<u>WRITTEN MATERIALS (to be submitted electronically unless otherwise noted):</u>

- Biography of 1-2 paragraphs.
  - Due: 3 weeks prior to the program.

- Contact information.
  - Due: Once you agree to *make* the presentation.

- Phone number where we can reach you on the day of the teleconference.
  - Due: Once you agree to *make* the presentation. Can change up to the day of the program.

- Signed speaker release form. This form can be returned via fax, mail or as a PDF.
  - Due: Once you agree to make the presentation.

- Course materials. If the materials are not your own, we need written permission to reprint.
  - Due: 4 weeks before the presentation.

- Script. The discussion will be managed by the moderator. We need at least bullets indicating what speakers will discuss during allotted times. We will provide you with a sample script.
  - Due: 3 weeks before the presentation.

- 1-2 “pocket questions”. These questions will be posed to the speakers by the moderator in the unlikely case that no listeners call with their own questions.
  - Due: 3 weeks before the presentation.
  - The moderator is responsible for overseeing the ABA eCLE web board for two weeks after the presentation. The Section maintains a web board and eCLE attendees are encouraged to pose questions through the site. Our experience has been that few attendees submit questions, but the moderator is responsible for ensuring that the questions which are posed are answered in a timely fashion. Due: 2 weeks after the presentation.

GETTING COMFORTABLE WITH DISTANCE LEARNING: TIPS ON BEING A TELECONFERENCE PANELIST

Below are tips on how to shape your content, to make the program more effective, technical considerations, and what to expect on the day of the teleconference. What we are trying to accomplish in one hour of training is the development of narrow competencies or cognitive skills that will be applied to a particular task or in a particular context. Audio teleconferences have many unique features different from live presentations. For example, many excellent live presenters have trouble with the lack of audience reaction on a teleconference. Without audience feedback, they don't know how to change their presentation to address audience boredom or confusion. This consideration and others are addressed below. You may be familiar with some or all of the points regarding teleconferences, but please review them as a reminder of how to effectively communicate in this medium.

DEVELOPING CONTENT AND WRAPAROUND

Setting the Stage: The Teleconference Open

First impressions are very important. We need to set the stage for the distance learning experience right from the start. An opening script can be written for the moderator or the Control Phone Operator can perform this function.

- Begin with housekeeping items (title, sponsors, listener instructions, etc.) to settle the audience and prepare their expectations. Panel introductions should include a short biography including experience and specific issues that he/she will be addressing (be sure to alert the program manager of any unusual partner/law firm names).
- The opening statement should include a **"grabber"** -- a statement that grabs the audience's attention and leaves them wanting more. This can be followed by, expectations/importance of the program objectives/outline description of structure and/or activities. These items should not take more than one sentence each. The opening can also include the length of the program and number of people attending. Questions should be encouraged.
- Keep in mind that the Audience is: 65% male, 35% female, 35% Solo practice, 25% Two-5, 65% Private Practice, 25% Corporate Law, 10% Government.

Body of the Program: Topic Length and Listener Fatigue

Topic presentations should be in 5-10 minute segments. In between topics, there should be discussion or questions. In general, participants can listen to a disembodied voice for no more than 15 minutes without losing attention. Shoot for 10-minute segments, so we can be sure that presentations do not exceed 15 minutes. If you subtract the time for housekeeping, introductions, opening, closing, and Q & A session, the time for content is approximately 40 minutes. It may not seem like a lot of time, but a great deal of information can be imparted in that time frame. Listener attention is usually high at the beginning of the program, levels off in the middle and then increases again as the participants perceive that the program is coming to a close. For this reason use all of some of the items below when developing your content:

- If possible, **use lists or bullet points** to introduce, organize and summarize your topic e.g., "The three most important areas you should concentrate on when participating in a teleconference are: 1. vocal techniques; 2. listener fatigue, and 3. phone technique." The audience likes "tips" or "steps" on how you deal with the topic. Giving tips or steps makes it easy to follow for the listener and organizes your remarks.
- When the audience perceives there's value in your ideas and recommendations, they'll be far more likely to listen, accept, and act on them. Statements like these **communicate value**: "What this means to you is" or "As a result you'll gain" or "A significant advantage is" or "You can reduce costs by as much as." Value statements should be incorporated throughout your presentation.
- **Insert listening cues:** "This is important" or "Now, remember this" or You might want to jot these points down"
- **Incorporate personal messages** into the main body of the presentation to stimulate audience attention. Create a scenario that builds a "word picture" or scene in the mind of the audience. Data is

not as persuasive as drama. Pedantry and percentages have far less impact than the personal interest scenario.

- Recognize the **need for listeners to participate actively.** For example, ask the audience to recall something (e.g., this can be as simple as stating, “I’d like you to think for a minute about what this might mean to your client”). Ask rhetorical questions. Pause for a brief moment to give the audience an opportunity to absorb the question and start mentally to form a response. Then present the answer with confidence.
- **Incorporate a listening break** every 15-20 minutes (A listening break can be anything that changes the pace of what has gone on before.)
- **Use summary and review** to aid retention. Group key points in clusters or chunks. A maximum cluster size of seven is the most effective in helping retention and learning. After introducing a new fact or concept, repeat it several times during the presentation to help retention.
- **Variety** in media helps keep interest high
- Think about the last point you will make or a **transition statement** to the next topic, so that the moderator will know when you are through and be able to introduce the discussion session, nest question, next topic or speaker. This last point or **<u>OUT CUE:</u>** will be inserted into the program “script” so that all of the panelists can follow along.

Teleconference Close: Ending on a Positive Note
The close of the teleconference should include a review of key points, reference to participant questions, if applicable, a positive closing statement and/or transition to the next program to encourage participation. A script for the conclusion can be written for the moderator.

<u>AUDIO TELECONFERENCE TECHNICAL AND AUDIENCE CONSIDERATIONS</u>

Vocal Techniques:
Messages should be designed for the ear as much as possible. **How** you say something is just as important as **what** you say. Varying your voice quality and rate of speech can greatly enhance the effectiveness of the program.
Remember to:

- Talk in a normal, conversational tone of voice
- Vary the levels of pitch and volume.
- Enunciate clearly. Phone equipment is not always of high quality and has a limited frequency range. Remember that the English language is full of similar sounds. Clear enunciation helps prevent misunderstandings and the need to repeat.
- Pacing – Speaking too slowly causes boredom and irritation. Speaking too quickly may decrease understanding. Slowly introduce a new topic. Quickly review previous material. Pause to draw attention to an important point.
- Enthusiasm -. Listeners respond to the enthusiasm in your voice. Keep the presentation as animated as possible.

Location Concerns:
Most offices are quiet enough for use on the teleconference. However, transmitted audio must be free from distortion and interference to achieve a high level of intelligibility. Please take an objective look at your office environment. Background noise (that you may no longer notice) typically comes from ventilation ducts, fluorescent light ballast, or cooling fans, all of which are amplified through the telephone. Another common problem is reverberation. It occurs when hard walls, floor, and ceiling surfaces reflect your voice around the room many times and back into the telephone receiver. If you notice these problems, consider changing the location from where you will be calling.

We suggest, putting a sign on your door that says, “**Teleconference in Progress. Do not Enter**” or notify everyone in your office that you will not be available during the call. **When you are a panelist, you can be heard at all times.**

Equipment/Phone technique:
The following are teleconference protocols:

- Panelists and the moderator may use a handset or headset. **Do not use your speakerphone;** the sound quality of the program will be compromised.
- Participants are in a "listen-only" mode until we begin the question and answer session. **All panelists can be heard at all times**. Limit/eliminate side conversations.
- Avoid paper rustling, tapping, and other distracting noises.
- Keep your mouth slightly away from the handset or headset. If you are too close, the microphone can overly emphasize the low frequencies, creating a muddy sound. Speak, as you would normally for any phone call. If you need more amplification, we will control it through the conferencing system.
- Identify yourself more often than you think is necessary

DAY OF THE TELECONFERENCE

Pre-Teleconference Call:
Approximately 20 minutes before the start of the program, you are conferenced into the call to go over any last minute details, synchronize watches, do a technical sound check, and to make sure you are connected for the call.
(**If you are not contacted by 15 minutes before the program, call 800-788-1085. Please make sure to tell the operator that you are a SPEAKER, so that they patch you through to the appropriate area. If you are disconnected during the call, hang up and an operator will call you and connect you again.)**

Beginning the Teleconference, Housekeeping and Introductions:
Promptly at 1:00 p.m. EST, (on a "typical" program) the control phone operator/teleconference moderator welcomes participants to the program and begins what is called "housekeeping" and the introduction of the program. The operator states that: the ABA Connection is a joint project of the ABA Journal, ABA Center for CLE, ABA Membership Department and is based on an article in the ABA Journal. Mentions the co-sponsors and suggests that participants call ABA Member Services for more information on any of the co-sponsor groups. Mentions the number of people on the call and any other matters. The operator then introduces the panel or the moderator does the introductions.

The Teleconference:
The teleconference is scheduled for 90 minutes. Please remember that after the introductions, and before the Q&A Session, speakers have, collectively, approximately 75 minutes to present content. Because it is a teleconference, you have only your voice to work with. We ask that you present as lively as possible. Listeners respond to the enthusiasm in your voice. Keep the presentation as animated as possible. Panelists not presenting can interject comments where agreed upon and appropriate.

Question and Answer Session:
(*We solicit questions prior to the program. If I receive any questions prior to the program presentation, I will fax them to all of you.)*

At approximately 2:15 p.m., ET the teleconference moderator announces to all participants that it is time for questions. The Control Phone Operator cuts in, invites participants to ask questions, and gives instructions. Participants are asked to direct their questions to a panelist or to the panel in general. **(Moderator and panelists should have questions prepared to "jump start" the questions and, though this has never happened, to cover Q & A time, if questions are not called in.)**

Panelists should repeat or paraphrase the question to clarify understanding and to ensure that all participants heard it.

After the question is asked and answered, unless we decide otherwise, the Control Phone Operator puts the caller back into "listen only" and brings in the next caller with a question, when requested by the moderator. Remember, there may be a slight delay in this process.

When all of the questions have been asked, or when time has run out, the Control Phone Operator or teleconference moderator ends the Q&A Session.

Teleconference Close:
The moderator wraps up the teleconference at about two minutes to the end of the scheduled close of the program. When ending the program, we ask the moderator to thank the speakers and audience for participating, do a brief review, mention the next program and remind listeners to complete and return their evaluations. This conclusion can be written for the moderator.

I hope this information has helped you become more comfortable with participating in the teleconference and that it will help you make your experience more enjoyable and effective. Again, please call if you have any questions.

Follow-up Questions:
As part of the requirements for some CLE and MCLE accreditation and to cover member questions we provide a web board where additional questions can be asked. Panelists are encouraged to visit the web board several times during the two weeks following the teleconference to reply to questions.

RPPT REAL PROPERTY DIVISION

eCLE Teleconference/Audio Webcast Production Process

The process is very user and speaker friendly since all speakers and participants can participate from their own desks on their own telephones. Participants can email questions that will be fed to the speakers by email by the staff. Also there is a live speakers blog that only the speakers and staff have access to that allows the speakers to communicate among themselves during the program.

We normally schedule RP division eCLE on the third Tuesday of each month at 1pm Eastern time. However, if there is a topic of immediate interest or if speaker demands require it we can get other days of the month. The 1pm Eastern time seems to generate the largest national audience. We normally average over 200 participants per program which is almost 10 times the number who typically attend live programs. Also, we find that participants tend to be people who do not get to attend live programs.

Here is an overview of how the process is handled:

1. Once the date and final title are determined, the program chair will be contacted by Joe Besharse, our marketing manager, to provide promo copy. Joe will provide samples and set a deadline. The final copy will be reviewed by the chair and the blast e-mail will go out approximately four weeks before air.

2. A planning call for faculty will be scheduled as soon as possible to review both content and the housekeeping aspects of the conference (Timing, live Q&A, Web Discussion Board, etc.). A 90 minute slot is divided into 5 minutes for introduction, 70 minutes for content, and 15 minutes for Q&A. A 60 minute slot normally has 1 to 3 minutes of introduction, 50 minutes or so for content, with the remainder for questions

3. Faculty will also be contacted with regards to course materials which is required for MCLE accreditation.   All outlines and bios will be due the week before the teleconference for posting to the ABA website. Registrants will download the outlines before the program.

4. A few days before the program, a script is sent to all faculty together with a speaker release.

5. The day of the program, faculty members are called 30 minutes before air to conduct sound checks and cover any last minute issues.