

IRENE BOSTON TRANSCRIPTION SERVICES

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TELECONFERENCES AND TELEPHONE INTERVIEW FACILITATION GUIDELINES & RECORDING TIPS

We have a wealth of experience in what works and what doesn't work when conducting and recording teleconferences and telephone interviews. These guidelines are divided into **facilitation advice** and more **technical recording tips**, as well as addressing any specific **teleconference and telephone interview transcription** issues. We hope that this will help our clients to make recordings of the highest quality which will, in turn, cut down on transcription times and costs.

Please see our [teleconference transcription](#) and [telephone interview transcription service](#) pages for details of the services we offer and our [Equipment](#) pages for further advice.

The majority of the guidelines below are common to both teleconferences with multiple participants and telephone interview situations, typically with one interviewee. Where there are tips related specifically to one or the other, these have been listed separately where necessary.

FACILITATION GUIDELINES - PLEASE DO...

Telephone interviews

Obtain necessary permissions from your interviewee(s) while arranging the interview. Ensure that they're aware they'll be recorded and that the recording will be transcribed. **Please be aware that it's illegal in some countries to make a telephone recording without the subject's permission.** If they suddenly object when you call, you may have to abandon the recording. If it's important to capture on the recording that the interview is non-attributable or that the interviewee gives their verbal permission for the interview to be recorded, do so at the beginning. This will protect you from any conflicts in the future and show clearly that you have addressed these issues.

Brief the interviewee - ensure that they're aware that **YOU** will be calling them and not the other way round, or time will be wasted while you both get the engaged signal! Brief them on **what time you'll be calling and confirm which number** is to be used - home, office or mobile. Remember that some people are seasoned interviewees but some will be understandably nervous about being recorded. As well as briefing them on the content of the interview or the questions you'd like to cover, it would also be helpful to remind them to **speak clearly and not too fast**. For interviews with **multiple participants**, ask them to **speak individually** and if any do talk over each other, you may have to ask them to repeat their comments. Send any briefing material about the topics in advance to save on telephone time and costs, unless you need to record the fact that you gave the interviewee a thorough briefing. If your interviewee will be on the move and contactable only via their mobile during the interview, try to suggest that they find a **quiet location** to take the call. They may be able to hear you if you're indoors somewhere quiet, but the recorder will pick up whatever background noise is intruding at their end. This will, in turn, affect the completeness and accuracy of the final transcript.

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FACILITATION GUIDELINES - PLEASE DO ... cont/d.

Teleconferences...

Inform participants of the date, start and estimated end times of the teleconference, and please be aware of any time differences. Give them adequate information on how they can access the teleconference, such as the dial-in number and passcodes or PIN numbers.

Confirm attendance from all the participants in advance. This will save time at the start of the conference call trying to locate Joe Bloggs who hasn't called in yet!

Reserve the time of your teleconference with your in-house technical staff if they're arranging it, or with the teleconference company; some require prior reservations.

Ensure that they have the **necessary equipment to also record** the teleconference - preferably on digital format for superior sound quality.

Visuals - some teleconference companies offer the facility to integrate a visual presentation, such as PowerPoint, into your conference call by broadcasting what you need via the web. Ensure that you provide the transcriber with these visuals if you wish them to be incorporated into your transcript. The visuals will also help with any keywords which may be common to the participants but not easily identifiable for the transcriber.

Brief participants - on any material that they'll need to bring to the teleconference or any preparation they'll need to do beforehand. Provide them with any briefing material including visuals, and an agenda well in advance of the meeting, and indicate how much time you envisage spending on each topic. A teleconference will proceed more smoothly if everyone is fully briefed beforehand and not struggling to catch up during the meeting.

Telephone issues - make sure that participants are aware **not to put the call on hold** at any time. If their company has 'on hold' music in its system, this will play into the conference call making it difficult for everyone else to hear and will ruin the recording. Use of the mute option may be possible but check with the conference call company first. Also be aware that every time someone 'mutes' their phone, the beep may be heard by everyone else on the call and the recorder, and this may drown out something being said. Ask everyone to **turn off their call waiting** or you and the recording equipment may hear nothing but beeps as everyone's calls go to voice mail!

Speak individually - ensure that participants are aware they should not speak all at once, however heated the teleconference may become. **Ask each individual to introduce themselves** at the beginning - this will help the transcriber to recognise voices later on in the recording. It also helps enormously if you can provide a **voice map** - a description of each voice and how we can match a voice to a name. **We can't put names to voices we've never heard before!**

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FACILITATION GUIDELINES - PLEASE DO... cont/d.

Moderator preparation - just prior to the teleconference, check that you have a list of participants, the agenda and any supporting materials to hand. Make sure that you can see a **clock** to keep track of time so you don't have to rush the later agenda topics in order to finish on time. Be there at the beginning of the call to greet each participant. Introduce yourself because not every participant may know your voice. **Take control from the beginning**, rather than coming in a few minutes later to find that they've started without you!

FACILITATION GUIDELINES COMMON TO BOTH TELECONFERENCES AND TELEPHONE INTERVIEW TRANSCRIPTION

Brief the transcriber on exactly what you need to be transcribed - see our [Definitions](#) page for clarification on the **type of transcript**. Decide if you need any housekeeping issues or background included. Provide the transcriber with a list of questions if the interviews follow a semi-structured format or an agenda. This will cut down on transcription time or reduce any issues over unclear sections of the recording. Decide if you want your questions typed in shortened format and only the individual responses in full. Provide a list of attendees' names, job titles and any other company information you'll need on the transcript.

Think about the **recording location**. Recording in a quiet location where you won't be interrupted is critical to ensure the best quality of sound recording. Brief all your participants or telephone interviewee that they'll also need to be in a quiet location with the minimum disturbance. With interviews particularly, your subject needs to be aware that any background noise such as radio or other people in the room may generate sufficient interference to affect the recording.

Ask everyone to **consider the acoustics of where they'll be sitting**. A large room with a high ceiling ('church' like conditions) will produce significant echo resulting in a 'booming' on the recording which could make it difficult to hear, especially if anyone has a quiet voice.

Minimise background noise - during the call, if it becomes obvious that someone is sitting in a noisy location with lots of background noise, it may be necessary to temporarily halt proceedings to ask them to move, or to remove whatever is causing the noise. In a telephone conference situation, if you allow that to continue, it may be **difficult for the other participants to hear** and will affect the quality of the recording and subsequent transcription.

Turn off all mobile phones. Text messages or voice mails emit a radio frequency which is inaudible to the human ear but your recording equipment will pick it up, and the resulting buzzing noise will drown out whatever is being said at the time. Turning mobile phones to 'silent' or 'vibrate' mode is not enough - they need to be turned off.

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FACILITATION GUIDELINES - PLEASE DO... cont/d.

Ensure the speakers can be heard. If speakers have quiet voices or mumble, they will not be picked up by the recorder, however sophisticated it might be. If you can't hear what they're saying, then the chances are we can't either on the finished recording. Invariably, people don't realise they're speaking softly - we rarely 'hear' our own voices. If they regard taking part as important enough to set aside time, the chances are they'll want their contribution heard. **Most are happy to speak up if asked to do so.**

Be firm during the recording. Although it may be difficult to interrupt, you may have to if participants or the interviewee begin to go off at a tangent.

FACILITATION GUIDELINES - PLEASE DO NOT...

Record in a noisy environment such as restaurants, open spaces, airports, pubs, trains, cafes if it can be avoided. Background noise is often more intrusive on recordings than we realise at the time. Voices can easily be swamped by extraneous noise. If people are talking about what to them are sensitive issues, they'll invariably drop their voice so anyone nearby can't hear what they're saying. If they do that, the recorder will not pick them up. **Record indoors if you have a choice.**

Leave windows open - however hot the day may be, windows need to be closed. Noise from traffic, roadworks and aeroplanes will all impact on your recording.

Sit near noisy machinery such as air conditioning, photocopiers, heaters or computers - even radios in the background can dominate a recording and make it impossible to hear.

Have crockery near the recorder. If you have refreshments during the teleconference or telephone interview, keep the cups away from the recorder. If it's too near, the clattering will be the loudest sound on the recording.

Speak over other participants. In a more conversational type interview or teleconference, it can be tempting to interject comments. In normal conversation, we tend to say 'yeah' or 'right' or 'okay' on a regular basis, if only to indicate to the other person that we're actually listening to them. It may be hard, especially over the telephone where you can't see when someone has stopped talking, but try and break yourself of this habit because **your interjections may drown out what's being said.**

Shuffle papers too near the recorder. As this may be the source of the nearest noise, that's what the microphone will hear and it will drown out whatever is being said by either you or the other participants or interviewee.

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RECORDING TIPS - PLEASE DO...

Telephone interviews

Fixed handsets - if possible, use a fixed handset rather than a cordless 'walkabout' handset to record from - it generates less static and interference. Encourage your interviewee to receive the call also on a fixed handset. Don't use the speaker on your phone to ask the questions - there will be significant echo and any background noise will interfere with the clarity of the recording.

Teleconferences

Headsets - if possible, we'd recommend the use of headsets as they make it easier for participants to hear each other. A fixed handset would be the next best thing, but a cordless handset or a mobile can be subject to interference and generate static which may be captured on the recording.

Speakerphones - if several participants in a conference call are calling in from the same location, they may be tempted to use a speakerphone to contribute. Please ensure that they **ONLY use a full digital duplex speakerphone** - anything else will be useless. Full duplex equipment ensures excellent clarity of sound and doesn't 'clip' words when several people speak at once. Other speakerphone systems will chop out words if any background noise dominates, so you'll lose much of the conversation. However, there are **disadvantages** with the duplex system. It's designed to pick up every sound, so as not to miss any contribution. So any static or background noise, such as the shuffling of papers, will also be captured and broadcast to the other conference call participants and will also interfere with the recording. Ensure therefore that all **participants are briefed** to make as little noise as possible, other than their vocal contributions of course! Using the mute button may cut out background noise from other speakers but it can also make a 'beep' noise each time it's used and this can be captured on the recording, drowning out whatever's being said at the time.

RECORDING TIPS COMMON TO BOTH TELECONFERENCE AND TELEPHONE INTERVIEW TRANSCRIPTION

Use recording equipment that is fit for purpose - we would urge all clients to **use digital recordings**. They produce an excellent sound quality which will cut down on transcription time, minimise the number of inaudibles and reduce costs. Please read our [comparison](#) between digital and analogue recordings. We cover what type of recording equipment is suitable for recording over the phone on our [Equipment](#) pages. It's essential to use equipment that can be plugged directly into the phone handset.

Choose an uncompressed digital setting - most digital recorders offer recording settings ranging from SHQ (stereo high quality) down to LP (long play). SHQ produces the largest file size but the best quality. HQ is a good compromise but LP produces the poorest quality. Don't compromise on quality just to save memory space.

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RECORDING TIPS - PLEASE DO... cont/d.

Use the **highest uncompressed quality level your recorder offers** - issues over file size and length of time to transmit the digital files are trivial compared to the production of a good quality recording. You can probably get away with a lower quality for dictation, but will need the highest quality for multiple participant interviews, conferences or focus groups or meetings.

Decide on a suitable digital audio level and file type - 8,000kHz should be suitable for dictation. 44,100kHz is the highest end of the range and produces exceptional recordings but there is a trade off in larger file sizes. Ensure you choose a digital file type which is compatible with transcription software. We discuss the pros and cons of the more common file types such as wav, dss, mp3 and wma [here](#).

Connection issues - during the teleconference or telephone interview, you may experience static or a bad connection with some participants. Rather than struggle through, ask whoever it is to hang up and redial. Or if it's a telephone interview, briefly stop the interview and call them back.

Test your equipment - assuming that you're using a professional teleconference company to record your conference call, they presumably will test the equipment beforehand. For a telephone interview, record something before you make the call to carry out the interview. Your interviewee will rapidly lose patience if you spend the first few minutes checking that your recorder is working.

Make a test recording using the same type of phone you'll both be using - whether that be landline, mobile or VOIP. If you can't plug your recorder into the mains and are reliant on batteries, ensure you have a spare set to hand, or a charger, and memory cards for a digital recorder. A common problem with telephone recording equipment can be echo, so check to see if you can minimise this, depending on the equipment you have. Most digital recorders will set the recording level automatically, although on some, you can change this setting. This can be useful if you have a speaker with a quiet voice or dominant background noise.

It may sound obvious but make sure that the **recorder is running** before you start the interview! I've heard horror stories from clients who've spent time, money and effort conducting an interview only to find the recorder wasn't switched on.

Test the sound levels - use headphones to check the recording levels on your test recording. What you hear through the headphones is a fair indication of what the transcriber will hear. If it's too faint, turn up the volume gain. Once you can hear clearly, we probably can too.

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RECORDING TIPS - PLEASE DO NOT...

Use a table top audio tape recorder or dictaphone and **DO NOT** put your phone on speaker to capture either a teleconference or telephone interview. The recording will be almost impossible to transcribe as you're asking the equipment to perform in situations for which it was never designed. We would urge you to use a recorder that can be plugged directly into your telephone, thus making a direct sound feed. Do **NOT** put a microphone next to the telephone handset or speaker and expect it to work!

Use a slow recording speed - if you are using a tape based system, please ensure that you record at the **fastest possible speed**. Some recorders can be used at slower speeds. This extends recording time and saves on the number of tapes used. However, there is a consequential loss in recording quality and an increase in the amount of background hiss. Tapes are comparatively cheap, so why save on tape costs when those savings will be swallowed up by the extra transcribing time and costs? For digital recorders, do not use compressed file formats to save on memory - this will compromise the quality of the recording.

Use voice activation. If you use recorders with a voice activation feature and the speaker has a quiet voice, this may not be picked up by the equipment. We've found that some recorders are not very sensitive and will sometimes switch off in mid-sentence if the sound level goes below the minimum pick up threshold. There's also a slight time delay between someone speaking and the recorder starting up again, so the beginnings of sentences are often chopped off.

Use the time-stamp bleep. Some recorders come with an option to insert a bleep at intervals. Please turn this off! Each time the recorder inserts a bleep, it will drown out any voices and will result in an incomplete transcript. Our transcribers are experienced in inserting time stamps where required without electronic help.

Send copies of audio tapes - original audio tapes will always be clearer than copies, regardless of the quality of the copying equipment. To ensure greater accuracy, please ensure that **only** original tapes are sent. Transcribing from a copy increases transcription time and your costs. Digital files do not degrade when copied - all analogue media does.

These guidelines relate to teleconference or telephone interview transcription and recording. Please use the above links for guidelines designed for any other recording situation.

If you have any questions not covered on this page, please contact us on 01485 543746 or Boston@ibss.fsnet.co.uk and we would be happy to help.