SOP: Scheduling and Calendar Management

This SOP details **scheduling and calendar management** processes, covering appointment setting, meeting coordination, conflict resolution, time blocking, priority setting, and usage of calendar tools. The goal is to enhance productivity, ensure efficient use of time, and maintain organized schedules for individuals and teams by establishing clear guidelines for managing appointments and important events.

1. Purpose

To define standard procedures and responsibilities for effective scheduling and calendar management, ensuring all appointments, meetings, and key events are efficiently coordinated and documented.

2. Scope

This SOP applies to all employees responsible for managing personal or team calendars, scheduling meetings, or organizing appointments within the organization.

3. Responsibilities

- **Administrative Assistants:** Coordinate scheduling and manage executive/team calendars.
- **Team Leads/Managers:** Approve meetings, set priorities, and resolve scheduling conflicts.
- **All Employees:** Maintain updated calendars and communicate availability.

4. Procedure

4.1 Appointment Setting

1. Check relevant calendars for availability before proposing an appointment.
2. Send calendar invitations with clear details (title, location, agenda, date, time, attendees).
3. Confirm appointments via email or calendar event acceptance.

4.2 Meeting Coordination

1. Identify required participants and propose multiple time slots if possible.
2. Book meeting rooms or virtual links (Zoom, Teams, etc.).
3. Share agenda and supporting documents at least 24 hours in advance.

4.3 Conflict Resolution

1. Monitor for overlapping events.
2. Communicate with affected parties to reschedule or delegate as needed.
3. Update all related calendar entries promptly.

4.4 Time Blocking & Priority Setting

1. Block time for high-priority tasks, project work, and breaks.
2. Review and adjust time blocks weekly to reflect any changes.
3. Prioritize critical meetings; set non-urgent appointments during less busy periods.

4.5 Usage of Calendar Tools

1. Utilize company-approved calendar platforms (e.g., Google Calendar, Outlook).
2. Enable calendar sharing with relevant team members.
3. Set reminders and notifications for important events.

5. Documentation

- Maintain detailed calendar entries for all events.
- Archive meeting notes and decisions in the designated shared drive or platform.

6. Review & Updates

This SOP will be reviewed annually or as needed to accommodate process improvements or new organizational tools.

7. References

- Employee Handbook
- IT Policy: Approved Software Tools

8. Revision History

Date	Version	Description	Author
2024-06-20	1.0	Initial release	Admin