

# Standard Operating Procedure (SOP)

## Executive Calendar Management and Scheduling Coordination

This SOP details the process of **executive calendar management and scheduling coordination**, covering the organization and prioritization of appointments, meetings, and events. It includes strategies for effective communication with stakeholders, conflict resolution, time zone considerations, and the use of scheduling tools to optimize the executive's availability and productivity. The goal is to ensure seamless coordination and efficient time management for executives, enabling them to focus on critical business priorities.

### 1. Purpose

To outline procedures for managing executive calendars and coordinating scheduling to maximize productivity and minimize conflicts.

### 2. Scope

This SOP applies to all administrative assistants, executive assistants, and staff responsible for or involved in managing executive schedules.

### 3. Responsibilities

- **Executive Assistants:** Oversee daily management of the executive calendar; proactively resolve conflicts; ensure scheduling aligns with priorities.
- **Executives:** Communicate scheduling preferences, priorities, and high-level requirements in advance to the assistant.
- **Stakeholders:** Submit scheduling requests via designated channels and respond promptly to coordination communications.

### 4. Procedure

1. **Gather Scheduling Inputs**
  - Collect requests for meetings, appointments, and events via email, calendar invites, or scheduling platforms.
  - Confirm purpose, attendees, desired timings, and duration for each request.
2. **Prioritize and Categorize**
  - Classify appointments (e.g., internal, external, confidential, recurring).
  - Consult executive's stated priorities to determine urgency and importance.
3. **Coordinate and Schedule**
  - Check executive's existing commitments and availability, including travel plans and personal commitments.
  - Consider stakeholders' time zones; propose suitable options for all participants.
  - Send calendar invites once consensus is reached, ensuring accurate meeting details and virtual links.
4. **Conflict Resolution**
  - Promptly flag overlapping or conflicting appointments to the executive.
  - Recommend rescheduling or delegate decision-making as appropriate.
5. **Communicate Updates**
  - Notify all stakeholders of schedule confirmations, changes, or cancellations promptly.
  - Maintain confidentiality with sensitive appointments.
6. **Daily & Weekly Review**
  - Review the upcoming calendar with the executive each morning and provide weekly overviews.
  - Proactively identify and address potential issues.

### 5. Tools and Resources

Tool	Purpose
Outlook / Google Calendar	Primary platform for organizing and viewing executive calendars.
Zoom / Teams / Google Meet	Virtual meeting facilitation and integration with calendars.

Scheduling Assistant Tools (e.g. Calendly, Doodle)	Efficient coordination of group meetings and availability.
Time Zone Apps (e.g. Timezone.io, World Clock)	Assists in scheduling across multiple time zones.

## 6. Best Practices

- Always double-check time zones for virtual and international meetings.
- Buffer 5-10 minutes between meetings for executive transitions.
- Periodically reassess recurring meetings for continued relevance.
- Maintain discretion and confidentiality at all times.
- Document and communicate protocols for urgent requests and after-hours scheduling.

## 7. Review and Updates

This SOP must be reviewed annually or as significant changes in process or tools occur.