Standard Operating Procedure (SOP): Follow-up Meeting Scheduling and Monitoring

This SOP details the process for **follow-up meeting scheduling and monitoring**, including defining meeting objectives, coordinating participant availability, setting agendas, sending timely invitations and reminders, tracking attendance, documenting discussions and action items, and evaluating meeting outcomes. The goal is to ensure effective communication, timely follow-up on decisions, and continuous progress monitoring through well-organized and monitored meetings.

1. Purpose

To establish a standardized process for scheduling, conducting, and monitoring follow-up meetings, ensuring effective communication and tracking of action items.

2. Scope

This SOP applies to all teams and departments responsible for organizing or participating in follow-up meetings within the organization.

3. Responsibilities

- **Meeting Organizer:** Schedules the meeting, prepares agenda, sends invitations/reminders, documents minutes, and follows up on action items.
- **Participants:** Confirm attendance, review agenda, actively participate, and complete assigned tasks.
- **Minute Taker:** Records discussion points, decisions, and action items (can be assigned per meeting).

4. Procedure

1. **Define Meeting Objectives**
   - Clarify the purpose and desired outcomes of the meeting.

2. **Identify Participants**
   - List required attendees based on the meeting objectives.

3. **Coordinate Availability**
   - Use calendar tools or scheduling polls to find an optimal time for all participants.

4. **Prepare and Distribute Agenda**
   - Draft a clear agenda with timing for each topic and responsible presenters.
   - Send the agenda with the meeting invitation.

5. **Send Invitations and Reminders**
   - Send calendar invitations at least 3 business days in advance.
   - Send a reminder 1 day before the meeting.

6. **Track Attendance**
   - Record attendance at the start of the meeting and note any absences.

7. **Document Discussions and Action Items**
   - Assign a minute taker to record key outcomes and action items.
   - Distribute meeting minutes within 1 business day after the meeting.

8. **Monitor and Follow Up on Action Items**
   - Track progress of action items until completion.
   - Discuss outstanding items in subsequent meetings.

9. **Evaluate Meeting Outcomes**
   - Solicit feedback on meeting effectiveness and adjust processes if necessary.

5. Documentation and Records

Document	Responsible	Retention Period
Meeting Agenda	Organizer	1 year
Attendance Record	Minute Taker	1 year
Meeting Minutes & Action Item Log	Minute Taker	1 year

6. Review and Continuous Improvement

- Periodically review this SOP and gather feedback from meeting participants.
- Update the SOP as needed to reflect best practices and organizational changes.

7. Revision History

Version	Date	Description	Author
1.0	2024-06-15	Initial SOP release	[Your Name]