SOP Template: Meeting Scheduling and Agenda Preparation

This SOP defines the process for **meeting scheduling and agenda preparation**, ensuring efficient coordination and clear communication. It includes guidelines for determining meeting objectives, selecting participants, setting dates and times, booking venues or virtual platforms, and drafting detailed agendas with prioritized topics. The goal is to facilitate productive meetings that maximize participant engagement and achieve desired outcomes.

1. Purpose

To establish a standardized process for scheduling meetings and preparing agendas that promote productive discussions and successful outcomes.

2. Scope

This SOP applies to all staff involved in organizing and conducting internal or external meetings.

3. Responsibilities

- **Meeting Organizer:** Initiates meeting scheduling, prepares the agenda, and communicates details.
- **Participants:** Confirm attendance, provide agenda input, and prepare for assigned topics.

4. Procedure

1. **Define Meeting Objectives**
   - Clarify the purpose and desired outcomes of the meeting.
   - Determine if a meeting is necessary or if objectives can be achieved alternatively.
2. **Select Participants**
   - Identify stakeholders essential to achieving the objectives.
   - Limit invitations to only those required to maximize focus and efficiency.
3. **Propose Dates and Times**
   - Suggest at least two date/time options based on participant availability using calendar tools.
   - Consider time zones for remote or international participants.
4. **Book Venue or Virtual Platform**
   - Reserve an appropriate meeting room or set up a virtual meeting link (e.g., Zoom, Teams).
   - Ensure necessary equipment (AV, conference phone, etc.) is available.
5. **Draft the Meeting Agenda**
   - List agenda topics in order of priority and allocate time slots.
   - Assign presenters or discussion leads to each agenda item.
   - Include space for additional items, action points, and next steps.
6. **Distribute Meeting Invitation and Agenda**
   - Send calendar invites to all participants at least 2 business days before the meeting.
   - Attach the detailed agenda and any preparatory materials.
7. **Confirm Attendance**
   - Request confirmations from participants.
   - Follow up with non-respondents as needed.

5. Documentation & Records

- Store meeting agendas and minutes in the designated shared directory or collaboration platform.
- Maintain a record of attendance and action items for accountability and follow-up.

6. Review & Improvement

- Periodically review the effectiveness of the meeting scheduling and agenda process.
- Solicit feedback from participants for continuous improvement.