SOP Template: Meeting Scheduling, Agenda Setting, and Follow-up Procedures

This SOP details the process for **meeting scheduling, agenda setting, and follow-up procedures**, covering the steps for organizing meetings efficiently, preparing and distributing clear agendas, managing participant invitations, conducting meetings effectively, and ensuring timely follow-up actions and documentation. The objective is to enhance communication, improve productivity, and ensure accountability in all organizational meetings.

1. Purpose

To outline the standardized procedures for organizing, conducting, and following up on meetings to ensure clear communication, improved productivity, and accountability.

2. Scope

This SOP applies to all staff responsible for organizing and participating in meetings within the organization.

3. Responsibilities

- **Meeting Organizer:** Schedules the meeting, prepares, and distributes the agenda, ensures attendance, documents minutes, and leads follow-up.
- **Participants:** Confirm attendance, review the agenda, contribute to discussions, and complete assigned follow-up actions.
- **Minute Taker (if applicable):** Records accurate meeting minutes and action items.

4. Procedure

4.1. Meeting Scheduling

1. Identify the need for a meeting, objectives, and required participants.
2. Use appropriate scheduling tools (e.g., Outlook, Google Calendar) to propose dates/times that accommodate the majority.
3. Book the meeting room or set up a virtual meeting link, if necessary.
4. Send calendar invites to all required participants, including meeting details and the purpose.
5. Request RSVPs and confirm attendance.

4.2. Agenda Setting

1. Draft a clear agenda outlining:
   - Meeting objective(s)
   - List of topics/issues to discuss
   - Presenter or discussion leader for each topic
   - Time allocation for each topic

2. Share the agenda with all participants at least 24-48 hours before the meeting.
3. Allow participants to suggest additional agenda items ahead of the meeting, if appropriate.

4.3. Meeting Execution

1. Start the meeting on time and confirm attendance.
2. Review and agree upon the agenda and meeting objectives.
3. Assign a minute taker if not already designated.
4. Facilitate discussion, keeping to the agenda and time allocations.
5. Summarize key decisions and action items before closing the meeting.
6. End on time.

4.4. Follow-up Procedures

1. Prepare and circulate meeting minutes within 24-48 hours of the meeting, including:
   - Summary of discussions
   - Decisions made
   - Action items, responsible persons, and deadlines

2. Ensure all participants acknowledge receipt of minutes and confirm their assigned action items.
3. Monitor the progress of action items and provide reminders as deadlines approach.
4. Review outstanding action items at the beginning of subsequent meetings.

5. Records Management

1. Store all meeting agendas, minutes, and related documents in the designated shared drive or folder for future reference.
2. Maintain records in accordance with the organization's document retention policy.

6. Templates

6.1. Agenda Sample

Time	Topic	Presenter
09:00 - 09:05	Welcome & Objective	Chairperson
09:05 - 09:20	Review Previous Action Items	Project Lead
09:20 - 09:35	Discussion Topics	Various
09:35 - 09:45	Assign New Actions	Chairperson
09:45 - 09:50	Wrap-up	Chairperson

6.2. Minutes/Action Items Sample

Action Item	Responsible	Deadline	Status
Prepare budget report	Finance Team	2024-07-05	In progress
Schedule follow-up meeting	Admin Assistant	2024-07-07	Pending

7. Review and Updates

This SOP should be reviewed annually or as needed to ensure relevance and effectiveness.