

Standard Operating Procedure (SOP)

Meeting Request Initiation and Approval Process

Objective:

To ensure efficient, transparent, and timely coordination of meetings while optimizing resource utilization and minimizing scheduling conflicts.

Scope:

This SOP applies to all staff involved in the planning, initiation, approval, and scheduling of internal and external meetings.

1. Roles and Responsibilities

Role	Responsibilities
Initiator	<ul style="list-style-type: none">Identifies the need for a meetingSubmits meeting request form with relevant detailsCoordinates with proposed participants on availabilityEnsures room/resource requirements are specified
Approver	<ul style="list-style-type: none">Reviews submitted meeting requestAssesses alignment with organizational priorities and participant availabilityApproves or rejects the meeting requestProvides feedback to the initiator if necessary
Administrative Support	<ul style="list-style-type: none">Assists with scheduling, logistics, and room/resource bookingMaintains meeting records and documentation
Participants	<ul style="list-style-type: none">Respond to invitations in a timely mannerNotify initiator/administration of availability or conflicts

2. Process Steps

- Initiation:**
 - Initiator completes and submits the meeting request form (physical/digital) including agenda, participants, preferred date/time, and resource needs.
- Preliminary Coordination:**
 - Initiator checks for major scheduling conflicts with key participants.
- Approval:**
 - Approver reviews request against approval criteria (see below).
 - If approved, notifies initiator and administrative support; if rejected, provides feedback.
- Scheduling:**
 - Admin support confirms participants' availability, books rooms/resources, and sends calendar invites.
- Communication:**
 - Meeting details (agenda, time, location, link) shared with confirmed attendees.
 - Changes or cancellations are communicated promptly.
- Documentation:**
 - Maintain record of meeting request, approval, invitations, and attendance.

3. Approval Criteria

- Clear, relevant agenda and objectives
- Key participants required and available
- Alignment with department or organizational goals
- Reasonable use of time and resources
- No major scheduling conflicts with critical stakeholders

4. Communication Protocols

- Use authorized communication channels (e.g., corporate email, calendar system)
- All participants to confirm attendance within 24 hours of invitation
- Changes to meeting details to be communicated at least 24 hours in advance, except in emergencies

5. Scheduling Guidelines

- Standard meetings to be scheduled during business hours
- Avoid back-to-back and same-time booking for key participants
- Adhere to room/resource availability

6. Conflict Resolution

- Conflicts identified during scheduling must be escalated to the approver or line managers
- Prioritize meetings based on organizational impact and urgency
- When required, reschedule lower-priority meetings or arrange alternates

7. Documentation Requirements

- Meeting request forms (digital/physical) retained per records policy
- Approval/rejection notations and justifications filed
- Meeting invitations and participant confirmations saved in calendar/email system
- Attendance and minutes recorded as appropriate

Review:

This SOP should be reviewed annually or as needed to ensure its effectiveness, and updated based on feedback or procedural changes.