How to schedule a meeting in today's workplace

Scheduling a meeting has always been a rather dreaded task, if for no other reason than those invited typically are not thrilled to attend. That, and finding a time when everyone can attend can often appear to be an impossible task. Now add modern complications to the mix: remote staff and clients, team members in different time zones, safety concerns if physically gathering, and schedules already jam-packed from labor shortages and pandemic obstacles. It's enough to make one question whether getting together is worth the effort.

And question you should. When you build a reputation as someone who only schedules meetings when they are truly necessary, others take them more seriously. They appreciate the respect shown for their time.

When you do decide a meeting is in the best interest, ways exist to eliminate some of the hassles of scheduling. Here, we offer a start-to-finish look at the process.

Alternatives to scheduling meetings

As ironic as it sounds, the first step in scheduling a new meeting is deciding if there should be one. Sometimes, the answer will be "yes," and you will need to take on the task of gathering people together. Other times, you will come to the conclusion that simpler communication methods work well for a given situation.

For instance, an email blast often proves convenient if you need to update staff members or share basic information. Not only does an email eliminate the hassle of holding a meeting, people can refer back to its specifics rather than rely on memory or take notes.

Need something more interactive? Share documents via the cloud and allow pertinent people to add or edit. Establish a Slack channel where those who would have been called into a meeting instead can post the details and current state of their assignments. Look into tools such as Hive, Trello, and Asana that facilitate communication and organization.

"Utilizing a collaborative project management platform can assist in reducing meeting attendance," says David Wurst, owner and CEO at WebCitz. "Because the entire team can see the large picture and clearly comprehend how their individual tasks affect project progress, the project manager is relieved of the responsibility of individually authoring and delivering status reports."

Creating an attendance list

After determining that holding a meeting truly is the way to go, draw up a list of who needs to be there. Including the "right" people makes the gathering productive and efficient. Casting too wide a net sets the stage for non-pertinent individuals sitting around bored while they could have been using that meeting time attending to other responsibilities. Accommodating "extra" people also creates more potential scheduling conflicts and may require rethinking the locale in order to space attendees out safely within a room.

“Deciding who needs to be present hinges on being very clear about the top priorities of the meeting,” says Stephen Light, CMO and co-owner of Nolah Mattress. “Once you’ve identified its purpose, then you can list the team members who would be impacted by the discussion at hand. If anyone is on the list who wouldn’t gather any helpful takeaways from the meeting, they might not require an invite.”

Begin the list with senior staff and work down. Generating it in this manner not only provides a framework for thinking through who should attend, it prioritizes attendees. Identifying which individuals are most critical to the meeting at hand helps down the line when trying to resolve any scheduling conflicts.

Watch, though, that in a well-intentioned effort to limit attendance you fail to get a good representation of viewpoints. Likewise, stay sensitive to what an invite or lack of one potentially conveys. Debating whether someone from another department would want to attend or would consider it a waste of time? Extend the meeting invitation as a goodwill gesture with a clear statement that the choice is up to them. (“We’re holding a meeting regarding Project X on January 12 at 3:00 in the main conference room. If you think it would be beneficial for someone from your department to attend, please RSVP “yes” to this email along with the representative’s name.”)

Determining the place

Many leaders like physical meetings. Bringing people together in the same place encourages interaction and builds camaraderie. Between distributed workforces and limits on how many people can gather in a room, though, holding such a meeting can prove difficult or impossible. At the present time, managers often limit on-site meetings to one-to-one conversations or very small groups.

Zoom meetings offer a reasonable alternative. Video conferencing allows attendees to still see one another and participate regardless of location. Participants can remove their masks for clearer communication if they set themselves up in an isolated area.

Sometimes, leaders opt to gather who they can on-site and let others Zoom in. Others would rather keep everyone using the same method. They may ask all to attend via video conferencing, even if doing so from the office itself.

Settling on a meeting date and meeting time

Perhaps no aspect of scheduling a meeting generates greater frustration than coming up with a time. More than ever, invitees may not be in the same time zone. Even those working on-site or remotely within the region may operate on different work hours due to the increase in flexible scheduling. And, of course, there is the age-old problem of simply finding a block that fits into multiple busy calendars.

Recurring meetings profit from sticking to a set timeslot. Workers who know they must attend a Zoom staff meeting at 10:00 a.m. EST every Tuesday will adjust their tasks and schedules accordingly to be in the waiting room at 9:59. Likewise, a client you see on a regular basis may prefer a standing appointment rather than needing to schedule each time, such as 2:00 p.m. CST on the last Wednesday of each month.

Leaders requesting a one-to-one meeting sometimes do so the old-fashioned way. They (or their administrative assistant) calls the invitee (or that person’s secretary), and the two hash out a mutually convenient time based on availability.

The majority of meetings nowadays, however, get scheduled through email, calendar apps, or some combination. How you go about it often depends on your needs, preferences, and the number of meeting attendees.

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For instance, Brian Donovan, CEO of Timeshatter, suggests the following, "Select a handful of times that you would be available for the meeting. Send an email to the participants asking them to attend the meeting, and ask them to respond with which of the listed times they would be available. I have found that it is easier to find a common time by listing out options to choose from instead of just asking, 'When is everyone available?'"

Thomas Fultz, founder and CEO of Coffeeble, employs a more tech-dependent strategy: "I use the official Outlook calendar to schedule meetings, but if I'm unable to find a time that works for everyone using that tool, I turn to Doodle. When scheduling with Doodle, you can offer up multiple times and dates in order to get an accurate picture of when everyone is available. For example, if I'm booking a meeting with four people, I'll check my availability against theirs and then present the proposed times."

Human resource departments often turn to meeting scheduler apps to book interviews with job candidates. They present a list of acceptable times, and the applicant can click on the one that works best for him to secure the spot. Leaders in any department who regularly conduct one-on-one meetings also benefit from this to-the-point method that limits back and forth.

For meetings consisting of multiple participants, scheduling often comes down to doing the best you can. Obviously, the person calling the meeting needs to attend. From there, work down the hierarchy previously created to find what works best for those deemed most important to be there. Other individuals with conflicts may need to adjust their own schedule or make a choice about whether or not to attend. An administrative assistant or another staff member can write out thorough meeting details to give to no-shows to get them up to speed.

Or, consider taking a creative approach to including as many people as possible, such as this one offered by Kathy Bennett, founder and CEO of Bennett Packaging.

"There are times when scheduling a meeting everybody can attend is impossible, especially when it's last minute. On these occasions, I'll run the meeting twice and keep notes of questions asked in the first to be repeated in the second so that the same topics are covered in each, as well as email a copy of questions raised in the second meeting to those who attended the first. It must be said that this is a rare arrangement, and commonly, we record the meeting via Teams and forward the recording to those unable to attend and provide a Slack discussion tab for ongoing discussions."

Confirming and informing

Once a time has been chosen, all invitees should be notified. Many offices do this through Google Calendar or Microsoft Outlook. The person doing the scheduling just needs to sign in, create an event, and add the email addresses of meeting attendees to automatically put the meeting in their schedule. Dealing with multiple types of calendars? Platforms like Doodle can work across them.

Emailing invitees is another option. Be certain when presenting the start time of the meeting that you include the time zone. This prevents remote recipients from wondering whether you meant 9 a.m. "my time" or "your time."

Consider including information beyond the meeting's time and place. Anticipating what others might want to know will limit the number of separate questions you will need to handle. Depending on the meeting type, circumstances, and participants, this might include:

- Directions to the meeting's location.
- A Zoom meeting link (or how and when you'll receive it).

- A list of who else will be present.
- A link to RSVP.
- The estimated length of the meeting and its end time.
- What the meeting will cover.

Many leaders find it beneficial to send out an agenda. Knowing what to expect enables participants to come to the meeting ready to contribute.

“If you know you’re going to ask certain questions or ask for certain comments or information at a meeting, make it clear to meeting participants beforehand. This allows staff to think about and prepare their replies and offers everyone more time to work through challenging topics,” says Gerrid Smith, chief marketing officer at Joy Organics.

Likewise, prepare and disseminate any supporting reports in advance of the meeting. As Wurst aptly notes, “You are unlikely to obtain sign-off on a 200-page technical specification if the first version they (attendees) see is the monstrous physical copy you distribute at the beginning of the meeting.”

Knowing what to expect at a meeting also aids with flow. A meeting attendee who notices a subject is not on the agenda may ask you why beforehand. Addressing individual concerns either before or after the formal meeting keeps from wasting the time of other participants. Nobody wants to sit at a meeting watching two people discuss something that does not concern them!

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