

Best Practice for scheduling meetings and events, such as ZOOM conference calls

Rather than send out meeting information by Email only, use a *Meeting* to communicate the information *and* schedule the date & time on calendars. Note, this is the default behavior when scheduling meetings in TEAMS.

That way:

- every recipient can simply click the Accept/Tentative/Decline RSVP buttons (aka: Yes/Maybe/No)
- the meeting is appropriately placed on each attendee's calendar
- the connection information is readily available within the meeting on the calendar

Three Big Wins!

The screenshot shows the Outlook 'Meeting' ribbon with various options like 'Appointment', 'Scheduling Assistant', 'Teams Meeting', 'Meeting Notes', 'Cancel Invitation', 'Attendees', 'Options', 'Recurrence', 'Time Zones', 'Room Finder', 'Categorize', and 'View Templates'. The meeting details are as follows:

- To: Williamson, TestUser
- Subject: Department Meeting re Budget
- Start time: Wed 9/25/2019, 11:00 AM
- End time: Wed 9/25/2019, 12:00 PM

The invitation text includes:

SEND USA is inviting you to a scheduled Zoom meeting.

Topic: Department Budget
Time: Sep 25, 2019 11:00 AM Eastern Time (US and Canada)

Join Zoom Meeting
<https://zoom.us/j/631495140>

One tap mobile
+16468769923,,631495140# US (New York)
+16699006833,,631495140# US (San Jose)

Dial by your location
+1 646 876 9923 US (New York)
+1 669 900 6833 US (San Jose)

Meeting ID: 631 495 140
Find your local number: <https://zoom.us/u/adGKMUMMK>

The right sidebar shows a calendar for September 2019 with a 'Room Fin...' window. A red box with the text 'Remember to set the Outlook meeting date and time, since it isn't automatically related to the conference call information.' points to the meeting time fields.

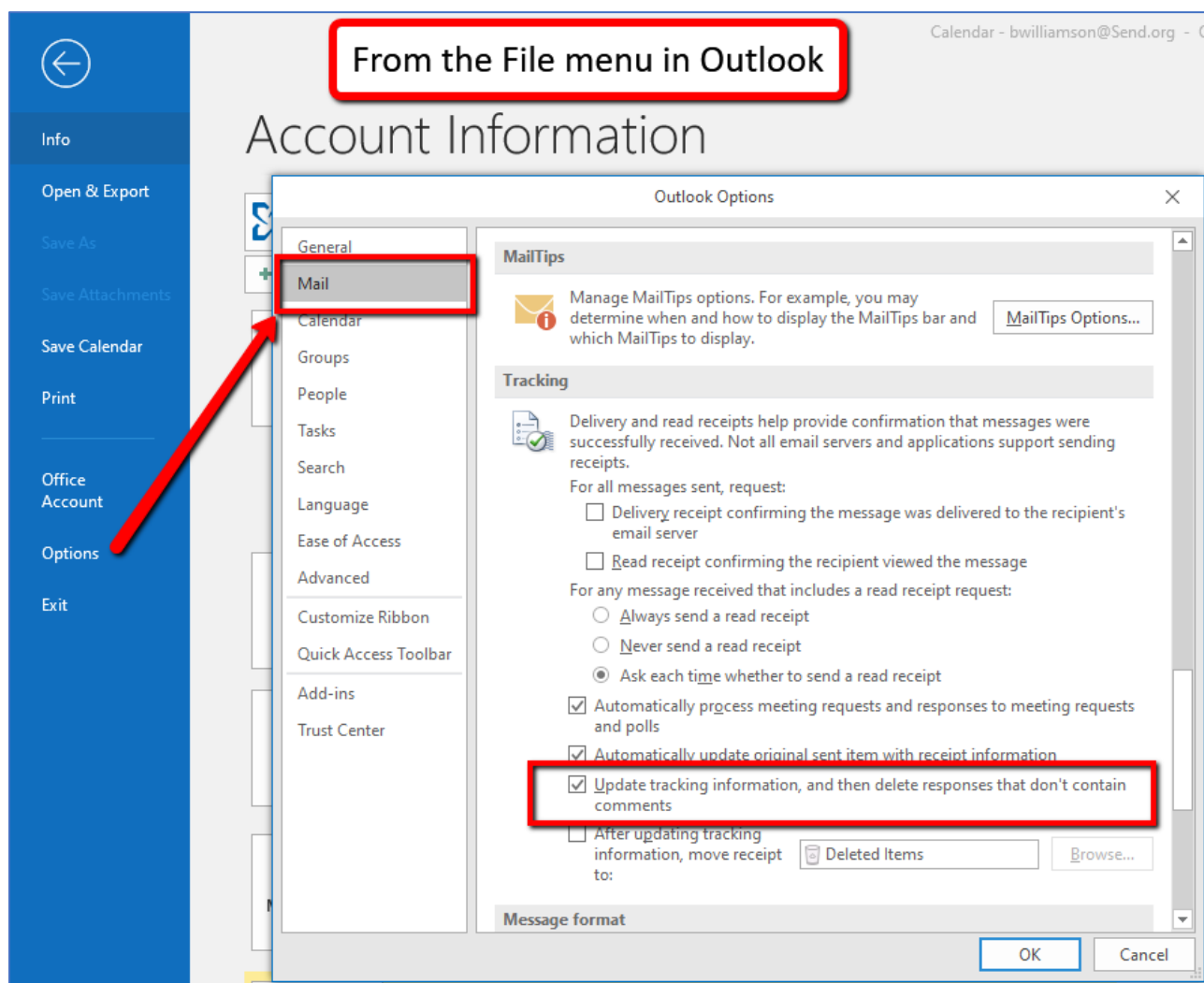
TIP: In order to not be overwhelmed with all the auto-generated response emails, set the Outlook option to automatically delete those that don't include comments.

That way:

- you only see necessary responses in your Inbox (those with comments)
- you can still use Tracking to see all invitee's responses
- you still have all the other replies available to you, in your Deleted Items, if you want to look at them

Three more wins!

To set this up, go to File, Options, Mail and check the option to "Update tracking information, and then delete responses that don't contain comments".



☺ Questions or need help?, contact IS@send.org...