Digital Tip in Action: Scheduling Meetings Online

[00:00] When scheduling a meeting, your first instinct might be to e-mail each individual that needs to attend. Instead, use your organization's calendar application or a free online scheduling tool to simplify the process. Every application functions a bit differently, but all are designed to minimize the number of e-mail messages needed to invite potential attendees, confirm their attendance, and modify or reschedule events as needed. Here's the basic process.

[00:30] Identify a time in which all attendees are available. Send invitations, which invitees can accept or decline. Once you receive their responses, you can modify the event as needed. If you're using a calendar application, you can invite colleagues that have shared or synced their calendar with yours, as well as contacts in your organization's shared directory. Alternatively, if you're using an independent online tool, be sure to have invitees' e-mail addresses on hand. Let's start with calendar applications. To

[01:00] schedule a meeting in Outlook, view your calendar. In the top toolbars, click "New Meeting." This opens a blank meeting invitation message and offers you a chance to use the Scheduling Assistant, showing you the availability of each invitee. This dialog box will also suggest times when all

[01:30] invitees are available. Another way to determine invitee availability is to use the Calendar Mode to view several calendars at once. Notice that the way each invitee has set up their sharing preferences determines the level of detail you see in their schedules. Looking at July 2nd, we see that one colleague is out of the office the full day.

[02:00] If we switch to July 8th, we see that the invitees have fewer scheduled events. It looks like 2 p.m. is a great time for a meeting. Once you've identified the best time, send a message that succinctly identifies the time, date, location, and purpose of the meeting. You can also include relevant attachments, such as a meeting agenda. Once an invitation is sent, the event will appear on each invitee's calendar. If the invitee accepts

[02:30] the invitation, the event will remain on their calendar. If the invitee declines the invitation, it will disappear. As the organizer of the meeting, you will be notified of each accepted and declined invitation. If it turns out that it would be better to reschedule the meeting or you need to change key information like location, go to your calendar, open the event, and change any necessary details. Because everyone's event is synced, your changes will appear in the calendars of those who accepted your invitation. The process is similar

[03:00] in iCal. View shared calendars to determine everyone's availability, and then create a meeting invitation using File, New Event, Add Invitees, and Send. Invitees will then respond. Now let's consider online tools. If potential invitees use a

variety of calendar applications, it can be difficult to determine their availability to meet. In that case, online scheduling tools can make the scheduling process easier.

[03:30] One popular tool for scheduling meetings is Doodle. It lets you poll invitees to find out the day and time they'd prefer to meet. Simply go to Doodle.com, and click "Schedule an Event." Fill in the information for your meeting, including the title, location, description, and your name and contact information.

[04:00] Select the dates and times you'd like invitees to consider. Then, send your invitation to the e-mail addresses you specify. Invitees

[04:30] will receive a chart where they can add their name and then select the times that work for them. Here, it looks like everyone is available on September 6th at 11 a.m. Search online for more popular scheduling tools, or consider some of these options. To schedule meetings efficiently, use digital tools to invite attendees, confirm their attendance,

[05:00] and modify or reschedule events as needed.