

GREAT MEETINGS: OUTLOOK MEETING TEMPLATE

WHY CREATE A TEMPLATE? Having a standardized meeting template for Outlook makes it much easier to create and distribute an effective agenda for a Great Meeting.

Step 1 Create Meeting

To create the meeting in Outlook 2010, 2013, or 2016:

- Click on **Calendar** at the bottom left of Outlook
- Click on the **Home** tab > **New Meeting** command in the Quick Access Toolbar

Step 2 Add Content

The following is text you can paste into your Outlook meeting. The bold headings represent the five recommended agenda elements for a Great Meeting. The grey text provides instructions for each element. The bracketed text is replaced when the template is used to create a meeting.

Objective

A clearly written statement of the meeting goal. Simple and focused. Defines a win. Deliver the objective and win the meeting.

<Your Objective>

Participants

*The **Leader** moderates the meeting, keeps it positive, on track, and ends it on time. The **Note Taker** records the draft decision and actions (and additional notes if needed). Other **Participants** are pared back to those with valuable insights or a strong stake in the outcome.*

Leader: <Name>

Note Taker: <Name>

Time-Box

This meeting will start and end on time. We strive to schedule short meetings (preferably 30 minutes or less).

Context

Why is this meeting important? What is the background? Is there a preliminary decision to be tested?

<Your Context>

Preparation

*The **Leader** commits to providing the smallest, most clearly written set of preparation materials that support the objective. **Participants** commit to carefully reviewing those materials before the meeting.*

<Your Preparation>

Step 3 Publish Template

To publish your template:

- Click on the **File** tab > **Save As** command
- Enter a **File name** for your template, such as "Meeting Template"
- Select **Save as type** > **Outlook Template**
- Navigate to a network location that is accessible to anyone who might need to schedule a meeting and click **Save**
- Create a shortcut for the template file and distribute that shortcut to other interested parties in your organization

Step 4 Use Template

To use the template:

- Double-click on the template file icon (or shortcut)
- Enter Header Items (To, Subject, Location, Start Time and End Time)
- Enter the information specific to your meeting (i.e., replace the bracketed text)
- Click **Send** to distribute the meeting