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Meeting Management

Template Set Getting Started Guide

With the Meeting Management template set, you can capture agenda items from meeting participants, sequence and prioritize agenda items in an agenda tracking sheet, manage meeting action items and access an archive of past meetings and notes.

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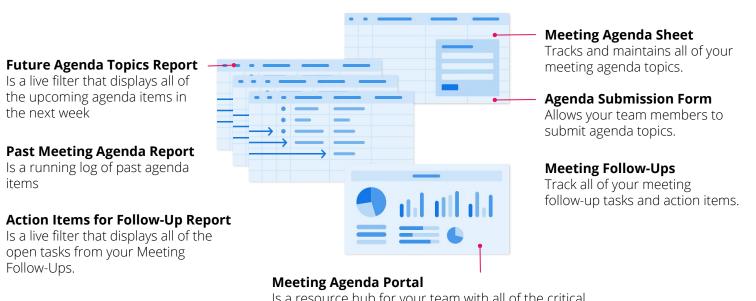
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REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. <u>Click here</u> to see a list of discontinued plans.

Download The data will be download in the *Sheets* folder - look on the left hand side under sheets. Meeting Management Template Set

How it works

With the Meeting Management Template Set, you can capture agenda items from meeting participants, sequence and prioritize agenda items in an agenda tracking sheet, manage meeting action items and access an archive of past meetings and notes.



Is a resource hub for your team with all of the critical elements of your meeting process

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Set Up

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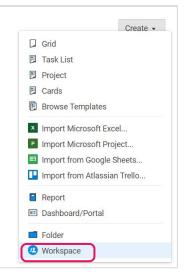
Using a <u>workspace</u> is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

Step 1: Create a New Workspace

Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.

Learn more:

Workspaces Overview, Workspace Sharing, Home Tab

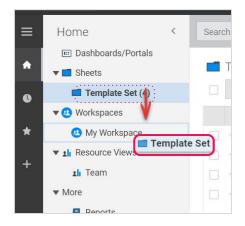


Step 2: Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.

Learn more:

Manage Items in a Workspace (Add, Move, Remove)



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Customize

Step 3: Meeting Agenda Sheet

The "Meeting Agenda" sheet is where you will track and maintain all of your meeting agenda topics. Use it to collect, collaborate, and manage your meeting agenda items. We've added a column for tracking minutes for each item so you can ensure your meeting runs on time.

- A. Add or delete any columns to accommodate your team's unique process: right-click on any column and select *Edit column properties* or *Delete*.
- B. Enter team members' names in column "Owner" to make it easier for your team to add agenda topics: click on the "Owner" column header, select *Edit column properties*, and add dropdown values for the members of your team.
- C. The formula in the "Time" column to calculate the total amount of time per meeting date.
- D. The blue parent rows are locked so that editors cannot accidentally change the formula.
- E. When new date (parent) rows are added to the sheet, ensure that the 'time" summary formula is included; =SUM(CHILDREN()) + " minutes"

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Learn more:

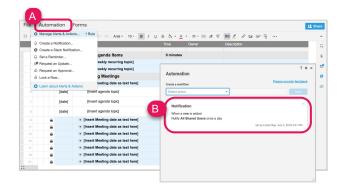
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Step 4:

Set Alert for New Meeting Agenda Submissions

An automated alert workflow is a great way to keep track of new information coming into your sheet. An alert has been set on this sheet to notify anyone shared to the sheet once a day when a new meeting agenda submission comes in.

- A. To edit the alert workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu.
- B. Then double-click on the workflow itself in order to edit the criteria.



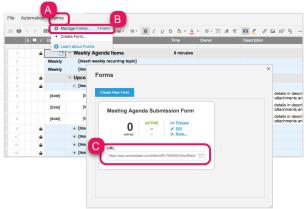
Learn more:

Save Time and Work Faster With Automated Workflows

Step 5: Meeting Agenda Submission Form

The "Meeting Agenda Submission Form" is how people submit new meeting agenda topics. Submissions are then added to the "Meeting Agenda" sheet where you can track agenda items and allocate time for each topic.

- A. Customize the form by first opening the "Meeting Agenda" sheet and clicking on *Forms* in the top menu.
- B. Click on *Manage Forms* and then *Edit* to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify *Form Options*.
- C. Hit *Save* to close the form builder and copy and save the URL displayed. This URL is what you'll give to everyone who will be submitting meeting agenda topics.



Learn more: Forms, Edit Existing Form Fields

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Step 6:

Meeting Follow-Ups Sheet

The "Meeting Follow-Ups" sheet is used to track your meeting tasks or action items. Tasks are separated by meeting dates using hierarchies similar to the "Meeting Agenda" sheet. We have also set up conditional formatting rules so you can visually identify tasks due today (red filled cell) or completed tasks (grey strikethrough on entire row). You can assign tasks in the "Assigned To" column, which is a *Contact List* column type. It's a best practice to use *Contact List* columns when assigning owners because they can be leveraged to set automated actions, notifications, reports, and more.

- A. Replace the placeholder texts with your meeting follow-up tasks, add the due date, and assign it to someone on your team.
- B. Mark the tasks has high priority if the task requires immediate attention.
- C. Modify, disable, or add conditional formatting rules by clicking on conditional formatting button in the top toolbar.
- D. An automated alert workflow has already been set on this sheet to notify anyone shared to the sheet when a new meeting follow-up task has been assigned to them. To view or edit the alert workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu. Then double-click on the workflow itself in order to open the editor window.

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5			Not Started	Research Smartsheet Automated Actions for automatic notifications on sheet changes		1	07/05/18		Chris	
6			In Progress	Get partner approved copy		4	[due date]		[Insert name]	
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15										

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Step 7:

Sheet Bonus: View or Edit Your Project Summary Data

For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The Meeting Follow-Ups sheet includes a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of the status of tasks listed on your sheet for follow-up. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

- A. Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.
- B. To add fields, click +New Field.
- C. Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.
- D. To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (¹) to open the field options dropdown menu.

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Learn more:

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Step 8:

Recurring Reminder

An automated recurring reminder is a great way to save time and keep track of deadlines. The Recurring Upcoming Due Date alert will notify the contact listed in the Assigned To column every day when the Due Date is in the next 3 days and where the current Status is Not Started, Having Issues, or In Progress. Note if you set up recurring reminders for other people, be thoughtful about how often you send the alert.

- A. Modify the reminder by going to *Automation* and selecting *Manage Workflows* in the dropdown menu. Then double-click on the workflow to open the editor window.
- B. To customize the workflow's schedule (trigger box), click on the dropdown that begins with *Every day starting on* and select Run once to trigger on a single date, or choose Custom to edit the recurrence schedule.
- C. Customize the workflow conditions (condition boxes) to add criteria and then click Save.

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		and where Due Date • is in the next (days) • 3 • Add another condition

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Step 9:

Updating Status and Filters

After the meeting follow-up has been assigned, the task owner can update the status by selecting an option from a custom dropdown list in the "Status" column. If you have a lot of owners, filters are a great way to help people cut through the noise. On the "Meeting Follow-Ups" sheet, we created a shared filter called "Tasks Assigned to Me". Anyone viewing the sheet can select that filter to only see their assigned items.

- To modify the options in the dropdown list, double-click on the "Status" column header and edit the options under *Values*.
- B. Select the *Filter Off* button in the toolbar to create, use or modify filters.

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Learn more:

Dropdown List, Filters, Shared Filter

Step 10: Action Items for Follow-Up Report

The "Action Items for Follow-Up" report is a live filter that displays all of the meeting follow-up tasks or action items that are not started, in progress, or having issues. This report will be surfaced in the "Meeting Agenda Portal" dashboard.

- A. Open the *Report Builder* and select the "Meeting Agenda" sheet in the "Where" field.
- Using the *Columns* button, select all of the columns you would like to display in your report, including the "Due Date" column.
- C. In the *What* field of the *Report Builder*, filter the report to rows where the "Status" is "Having Issues", or "In Progress", or "Not Started".

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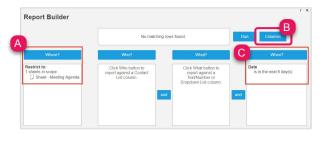
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Step 11:

Future Agenda Topics Report

The "Future Agenda Topics" report is a live filter that displays all of the upcoming agenda items in the next week. This report will be surfaced in the "Meeting Agenda Portal" dashboard.

- A. Open the *Report Builder* and select the Meeting Agenda sheet in the *Where* field.
- B. Using the *Columns* button, select all of the columns you would like to display in your report, including the "Date" column.
- C. In the *When* field of the *Report Builder*, filter the report to rows where the "Date" is "in the next 6 days."



Step 12: Past Agenda Topics Report

The "Past Agenda Topics" report is a running log of past agenda items. This report is surfaced in the "Meeting Agenda Portal" dashboard.

- A. Open the *Report Builder* and select the Meeting Agenda sheet in the *Where* field.
- B. Using the *Columns* button, select all of the columns you would like to display in your report, including the "Date" column.
- C. In the *When* field of the *Report Builder*, filter the report to rows where the "Date" is "in the past."



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Step 13:

Setup the Dashboard

The "Meeting Agenda Portal" dashboard serves as a resource hub for your team with all of the critical elements of your meeting process. Dashboards are made of different widgets that pull in live information from your sheets and reports.

- A. Enter your company name and team name in the *Title* widget.
- B. Replace the placeholder logo with your own logo in the *Image* widget.
- C. "Welcome" is a *Rich Text* widget where you can add custom text.
- D. Update the "Add New Meeting Agenda Items (example)" *Web Content* widget with your Meeting Agenda Submission Form URL, found in the Meeting Agenda sheet.
- E. The "Action Items for Follow-Up", "Future Agenda Topics", and "Past Agenda Topics" are *Report* widgets that embed your live reports into the dashboard.

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anything related to our weekly team meeting. If you have any questions, please feel free to reach out to me at first.last@company.com. Thank you! Meeting Agendas Meeting Agendas Meeting Agenda Submission Form If you would like to add a topic to an upcoming team meeting, ple add it via this form! Date Topic Time Owner Description Meeting Agenda Chaise Meeting Agenda Submission Form If you would like to add a topic to an upcoming team meeting, ple add it via this form! Date Topic Name*		Add New Meeting Agenda Items (example)	oming Agendas	View Past & Upco					Welcome!
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Learn more:

Make Changes to an Existing Dashboard, Viewing and Sharing a Dashboard, Widget Types for Smartsheet Dashboards, Rich Text Widgets, Report Widgets, Shortcut Widgets

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Step 14:

Share your Solution

Sharing is the best way to collaborate with others involved in your process. You can share your entire workspace with members of your team, or you simply share individual items within the workspace. For more information on sharing and permission levels, check out this <u>infographic</u>.

Invite Collaborators	Permissions 🕧
Enter names or email addresses	L Editor - can share
Invite Details	Admin Editor - can share
Subject Line	Editor - cannot share Viewer
Invitation to Edit	
Personal message (optional)	
Personal message (optional). ✓ Notify people □ Cc myself	
	This sheet is in a workspace: <u>_Template Set Worksp</u>

Learn more: Workspace Sharing