

# 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