



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.

Meeting Management

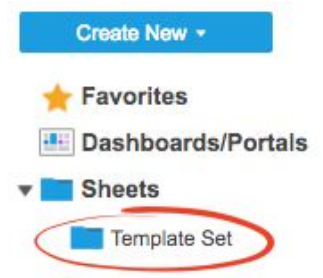
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REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited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

Future Agenda Topics Report

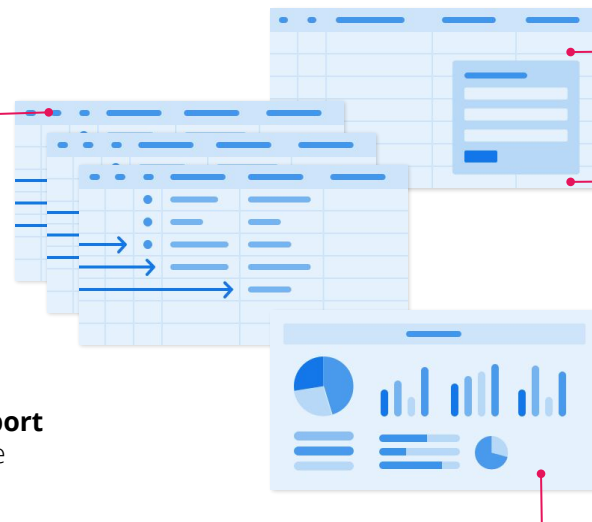
Is a live filter that displays all of the upcoming agenda items in the next week

Past Meeting Agenda Report

Is a running log of past agenda items

Action Items for Follow-Up Report

Is a live filter that displays all of the open tasks from your Meeting Follow-Ups.



Meeting Agenda Sheet

Tracks and maintains all of your meeting agenda topics.

Agenda Submission Form

Allows your team members to submit agenda topics.

Meeting Follow-Ups

Track all of your meeting follow-up tasks and action items.

Meeting Agenda Portal

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

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Set Up



Using a [workspace](#) is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

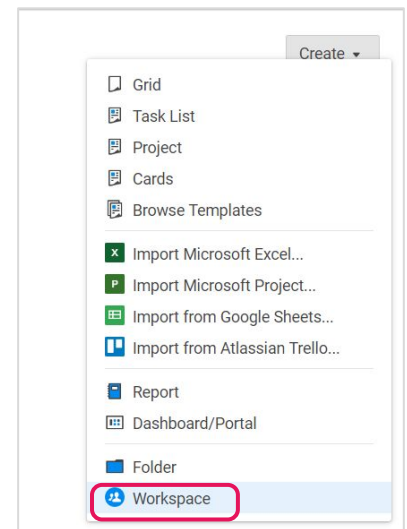
Step 1:

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](#)



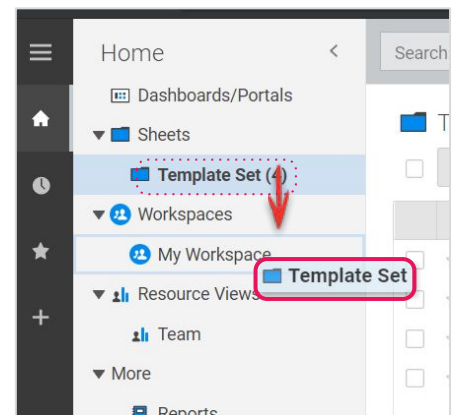
Step 2:

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.

- Add or delete any columns to accommodate your team’s unique process: right-click on any column and select *Edit column properties* or *Delete*.
- 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.
- The formula in the “Time” column to calculate the total amount of time per meeting date.
- The blue parent rows are locked so that editors cannot accidentally change the formula.
- When new date (parent) rows are added to the sheet, ensure that the 'time' summary formula is included; `=SUM(CHILDREN()) + " minutes"`

The screenshot shows a Smartsheet interface with a 'Meeting Agenda' template. The sheet has columns: Date, Topic, Time, Owner, and Description. The data is organized into sections: Weekly Agenda Items, Upcoming Meetings, Past Meetings (Archive), and New Agenda Submissions. Annotations A through E highlight specific features: A points to the 'Topic' column header, B points to the 'Owner' column header, C points to the '60 minutes' value in the 'Time' column, D points to a locked row (indicated by a padlock icon), and E points to the '0 minutes' value in the 'Time' column of the 'New Agenda Submissions' row.

	Date	Topic	Time	Owner	Description
1		Weekly Agenda Items			
2	Weekly	[Insert weekly recurring topic]			
3	Weekly	[Insert weekly recurring topic]			
4		Upcoming Meetings			
5		[Insert Meeting date as text here]	60 minutes		
6	[date]	[Insert agenda topic]	20	[Insert name]	[Add details]
7	[date]	[Insert agenda topic]	15	[Insert name]	[Add details]
8	[date]	[Insert agenda topic]	25	[Insert name]	[Add details]
9		Past Meetings (Archive)			
10		[Insert Meeting date as text here]	20 minutes		
11		[Insert Meeting date as text here]	20 minutes		
12		[Insert Meeting date as text here]	20 minutes		
13		Past Meetings (Archive)			
14		Past Meetings (Archive)			
15		Past Meetings (Archive)			
16		*New Agenda Submissions*	0 minutes		

Learn more:

[Formulas & Functions](#), [Locking & unlocking columns](#), [Inserting, deleting & renaming columns](#), [Contact List column type](#)

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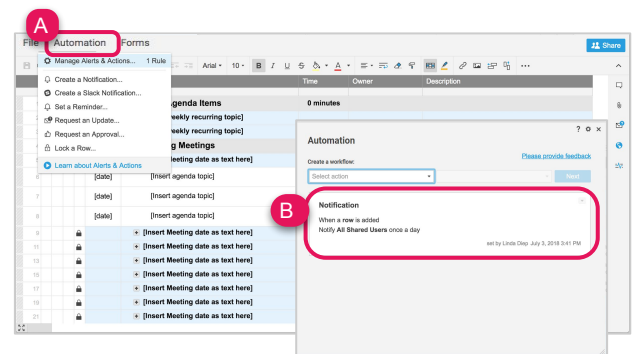
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Step 4:

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.

- To 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 edit the criteria.



Learn more:

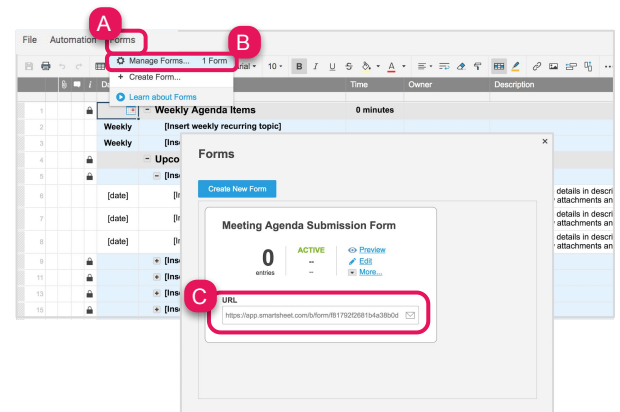
[Save Time and Work Faster With Automated Workflows](#)

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.

- Customize the form by first opening the “Meeting Agenda” sheet and clicking on *Forms* in the top menu.
- 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*.
- 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.

- Replace the placeholder texts with your meeting follow-up tasks, add the due date, and assign it to someone on your team.
- Mark the tasks has high priority if the task requires immediate attention.
- Modify, disable, or add conditional formatting rules by clicking on conditional formatting button in the top toolbar.
- 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.

The screenshot shows the Smartsheet interface for the 'Your Meeting Follow-Up' sheet. Annotations are as follows:

- A**: Points to a task row with a blue background and a strikethrough, indicating a completed task.
- B**: Points to the 'Priority' column, which contains exclamation marks for high priority and downward arrows for medium priority.
- C**: Points to the conditional formatting button in the top toolbar.
- D**: Points to the 'Automation' tab in the top navigation bar.

	Status	Follow Up Item	Priority	Due Date	Next Step	Assigned To
1		Your Meeting Follow-Up				
2		[Insert Meeting date as text here]				
3	Complete	Finish artwork for brochure, web, and video	!	07/02/18	Sent off to print today and publish the video on YouTube later in the afternoon.	Phil
4	Complete	Send new ad to web magazines	↓	07/04/18	Follow up with Jackie on quote	Kelly
5	Not Started	Research Smartsheet Automated Actions for automatic notifications on sheet changes	!	07/05/18		Chris
6	In Progress	Get partner approved copy	↓	[due date]		[Insert name]
7		[Insert Meeting date as text here]				
8		[Insert task here]		[due date]		[Insert name]
9		[Insert task here]		[due date]		[Insert name]
10		[Insert task here]		[due date]		[Insert name]
11		[Insert Meeting date as text here]				
12		[Insert task here]		[due date]		[Insert name]
13		[Insert task here]		[due date]		[Insert name]
14		[Insert task here]		[due date]		[Insert name]
15						

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Step 7:

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.

- 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.
- 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.
- Customize the workflow conditions (condition boxes) to add criteria and then click *Save*.

The screenshot illustrates the Smartsheet Automation editor. On the left, the 'Automation' panel shows a list of workflows, with 'Recurring Upcoming Due Date Alert' selected. A red circle 'A' highlights the 'Automation' tab. On the right, the 'Recurring Upcoming Due Date Alert' editor is shown. A red circle 'B' highlights the 'Trigger' box, which is set to 'When a date is reached' with a dropdown menu showing 'Every day starting on 06/18/19'. A red circle 'C' highlights the 'Conditions (2)' box, which is set to 'Where Status is one of' with options 'Not Started', 'Having Issues', and 'In Progress', and 'and where Due Date is in the next (days)' with the value '3'. The workflow is titled 'Recurring Upcoming Due Date Alert' and has an action of 'Alert someone'.

Learn more:

[Alerts & Reminders](#)

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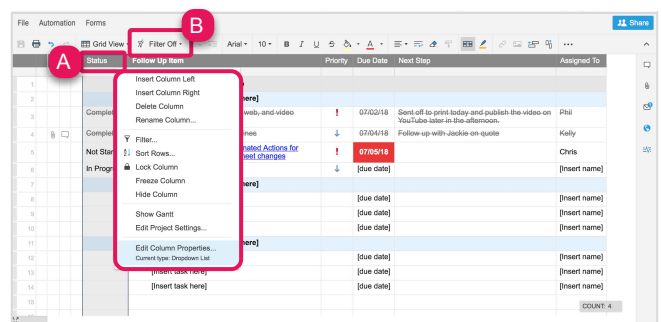
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Step 8:

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*.
- Select the *Filter Off* button in the toolbar to create, use or modify filters.



Learn more:

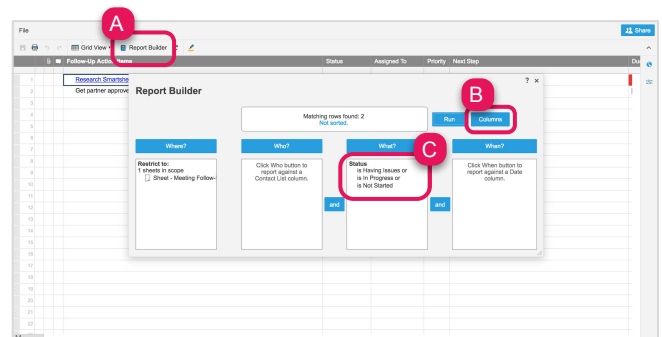
[Dropdown List](#), [Filters](#), [Shared Filter](#)

Step 9:

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.

- 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.
- 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”.



Learn more:

[Use Reports to Organize Data](#), [Build a Report](#)

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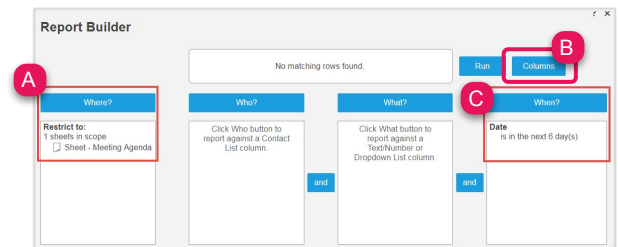
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Step 10:

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.

- 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 “Date” column.
- In the *When* field of the *Report Builder*, filter the report to rows where the “Date” is “in the next 6 days.”

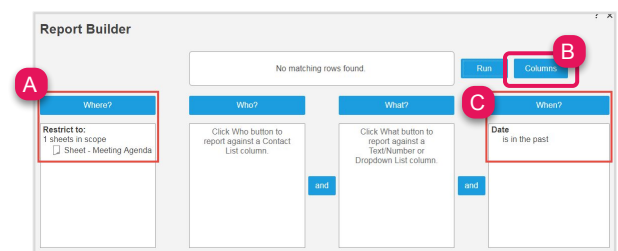


Step 11:

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.

- 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 “Date” column.
- In the *When* field of the *Report Builder*, filter the report to rows where the “Date” is “in the past.”



Learn more:

[Use Reports to Organize Data](#), [Build a Report](#)

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Step 12:

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.

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

The screenshot shows a Smartsheet dashboard titled "[Company Name] • [Team Name] Meeting Agenda". The dashboard includes several widgets:

- A:** Edit button in the top left corner.
- B:** Placeholder logo in the top right corner.
- C:** Welcome! widget with a rich text area containing a welcome message and contact information.
- D:** Add New Meeting Agenda Items (example) widget, which is a Smartsheet form titled "Meeting Agenda Submission Form".
- E:** Report - Action Items for Follow-Up widget, which displays a table of action items.

Table 1: Follow-Up Action Items

Follow-Up Action Items	Status	Assigned To
Research Smartsheet Automated Actions for automatic notifications on sheet changes	Not Started	Chris
Get partner approved copy	In Progress	[Insert name]

Table 2: Report - Future Agenda Topics

Date	Topic	Time	Owner	Description
Weekly	[Insert weekly recurring topic]			
Weekly	[Insert weekly recurring topic]			

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 13:

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 [infographic](#).

Learn more:

[Workspace Sharing](#)