Appointments and Scheduling Policy and Procedure

Policy Statement

My Department Stores is committed to providing staff with the tools, resources and information needed to effectively manage their time and schedules.

Meeting and Appointment Protocols

My Department Stores asks all of its staff to adhere to the following protocols to ensure schedules are feasible and allow staff to achieve their objectives and manage their stress.

When booking meetings and appointments staff must allow adequate time between appointments to travel from one meeting/appointment to the next, to take regular lunch breaks, and to minimise overall stress. Meetings/appointments must **not** be:

- Within 20 minutes following another meeting/appointment
- Followed by another meeting/appointment within 20 minutes

When booking meetings and appointments staff must ensure they do not take up the entire working day. Staff should not exceed 6 hours per day in meetings/appointments

Electronic planning tools

When using electronic calendars, the available functions should be used when appropriate to communicate meetings/appointments and improve the efficiency of bookings.

- Calendars should be shared between teams when appropriate
- Calendar invites should be used to communicate meeting confirmation details internally and externally
- Teams which are customer facing, should use My Department Stores text messages app to confirm meeting/appointment details with customers by text message 24 hours before an appointment

Paper based planning tools

When using paper based diaries and schedules, staff should type into electronic copies of documents rather than print (when practicable) or ensure that meetings/appointments/etc. are hand written clearly and legibly.

Scheduling Appointments Process

The following steps should be completed when scheduling meetings with external stakeholders:

1. Identify whether the appointment is one-off or recurring
2. Identify the attendees to be invited

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3. Request advice from attendees about their availability and preferred location
4. Select an appointment time when all attendees are free and location
5. Create the meeting in MS Outlook (or similar)
    a. Record the appointment name, times and location
    b. Click Invite attendees and record the attendee's email addresses
    c. Send the appointment invitation

Scheduling Internal Meetings Process

The following steps should be completed when scheduling meetings with internal stakeholders:

1. Identify whether the meeting is one-off or recurring
2. Identify the attendees to be invited
3. Review the attendee's personal requirements for meetings *(i.e. work hours, location or work, leave, etc.)*
4. Review the attendee's calendars to identify their availability
5. *If a meeting room is required,* review the room booking calendar to check room availability
6. Select a meeting time when all attendees are free and (*if a meeting room is required*) a room is available
7. Create the meeting in MS Outlook (or similar)
    a. Record the meeting name, times and location
    b. Set the meeting to reoccur if required
    c. Click Invite attendees and record the attendee's email addresses
    d. Send the meeting invite
8. *If a meeting room is required,* update the meeting room calendar

Scheduling External Meetings Process

The following steps should be completed when scheduling meetings with external stakeholders:

1. Identify whether the meeting is a one-off or recurring
2. Identify the attendees to be invited
3. Request advice from attendees about their availability
4. *If a meeting room is required,* review the room booking calendar to check room availability
5. Select a meeting time when all attendees are free and (*if a meeting room is required*) a room is available
6. Create the meeting in MS Outlook (or similar)
    a. Record the meeting name, times and location
    b. Set the meeting to reoccur if required
    c. Click Invite attendees and record the attendee's email addresses
    d. Send the meeting invite
7. *If a meeting room is required,* update the meeting room calendar

Room Booking Process

The following steps should be completed when booking meeting rooms:

1. Select the correct room booking calendar
2. Record the name of the meeting, and who booked it, in the required timeslot

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Protocols for Personal Calendars

When managing personal calendars, staff may wish to add reminders, include personal commitments (which occur during business hours or weekend/after work plans) and work deadlines to help them manage their time more holistically.

When scheduling personal commitments, My Department Stores recommends recording the item with the name *'Personal'* to avoid displaying private information in calendars that others may see (especially on shared calendars).

Scheduling Deadlines Protocol (informal)

The following steps should be completed when scheduling reminders for deadlines:

1. Identify important deadlines
2. Create the meeting in MS Outlook (or similar)
    a. Record the deadline name and times
    b. Set a reminder alert if preferred

Scheduling Personal Commitments Protocol

The following steps should be completed when scheduling personal commitments:

1. Identify personal commitments
2. Create the meeting in MS Outlook (or similar)
    a. Record the commitment name as 'personal' and the start and end times
    b. Set a reminder alert if preferred