ACTION STEPS
For Delegating Calendar Management

CALENDAR ACCESS

- ☐ Determine the platform used (Google Calendar, Outlook, etc.).
- ☐ Decide access level required (Full/Partial) & tech setup steps (2FA plan, etc.).
- ☐ Determine password sharing method (Password Manager, Shared Document, etc.).
- ☐ Determine if inbox access is needed for scheduling related communication.
- ☐ Determine meeting lengths (30min, 1 hour, etc.), meeting type (Zoom or other, phone call, etc.), time between meetings, etc. If Zoom, determine whose link will be utilized.

SETUP & ONBOARDING INSTRUCTIONS

- ☐ Discuss instructions for calendar management (how often, alerts, responses, etc.).
- ☐ Define communication preferences for process updates and/or changes to tasks.

SCHEDULING MEETINGS

- ☐ Decide how your Freedom Maker will handle incoming meeting requests and availability coordination. Define gaps as necessary (are back-to-back meetings appropriate or should there be a buffer between, etc.)
- ☐ Discuss a process for confirming meetings and managing scheduling conflicts.
- ☐ Determine guidelines for setting meeting reminders and notifications.
- ☐ Decide upon protocols for handling meeting cancellations and rescheduling.
- ☐ Discuss the naming convention to be used on invites.
- ☐ Determine if the client prefers to have travel/prep time built into the invite itself or as its own block.

MEETING PLANNING & FOLLOWUP

- ☐ Detail pre-meeting preparation steps, including gathering necessary documents.
- ☐ Determine how to take and organize meeting minutes and action items.
- ☐ Describe preferences for followup communication post-meeting.
- ☐ Determine the best way to archive and organize meeting notes.

BOOKING APPOINTMENTS & RESERVATIONS

- ☐ Provide instructions for booking personal and professional appointments.
- ☐ Explain preferences for appointment integration (shared calendar? etc.).

OTHER IMPORTANT CONSIDERATIONS

- ☐ Determine what scheduling tools and apps may streamline calendar management.
- ☐ Decide on a common time zone to be used for all scheduling.
- ☐ Describe protocols for managing recurring scheduling patterns.