Regional Leadership Calendar Protocol

*The purpose of the protocol is to have a forward lookout and insight on everyone’s calendar within regional leadership. The goal: to ensure everyone has time to be prepared & ready for the meeting and/or call.*

Normal Work Day is 8 am to 5 pm

Daily

* Look at the day and rest of the week to verify that everything is properly scheduled with the appropriate details. (Attendees to be on the call, call leader, agenda, supporting documents, etc)

Every Thursday

* Look at the following week to confirm that the schedule is set for the week with zero conflicts (unless approved by TL)
* Send an email update of the run down along with any action that is needed for any of the calls/meetings (or include in OneNote along with weekly notes)
* Include in OneNote when all the travel is booked along with any action that is needed for any of the calls/meetings

Middle of the Month

* Confirm travel for the next month (subject to change) in OneNote
* Remove any double-booked calls/meetings at least 2 weeks out

Fundamental Schedule Rules

Plan time throughout the Day & Week

1. Breaks
2. Office time to allow for emails, check-ins etc
3. Call prep for MBR, QBR, Global Calls
4. Lunch
5. Returning calls
6. Drive Travel/Time
7. Sensitive meetings
8. Recharge

Guidelines:

* If there are meetings that need to be moved make sure that this is approved (we can’t always wait for approval on these – it is our job to find the best options to move them that accommodates all): within reason depending on the nature/attendees of the meeting.
* If it is approved then make sure the reminder is set for the day before. Also make sure that any travel and/ drive time needs to be built into the calendar
* If a schedule is changed during the day for the following day, make sure you connect by phone and/or text to communicate the changes.
* If a call or meeting is outside the normal workday times - notify the attendees and host via text or phone call so they are aware, or via OneNote if it is in the coming weeks. Final reminder will come via text by end of business day, the day prior from the EA.
* Information Sensitive Meetings – send invite without details, call/text the attendees with information needed and any prep to be completed

Many times, calls or meetings are requested last minute and make us change meetings for multiple people. An email to communicate and/or follow up text to inform attendees. \*\*24-hour rule\*\*

\*\*If a call is rescheduled within 24 hours of original invite: Resend invite after confirming availability, text all attendees to inform them of the change.