Meeting Maker Makes News

Background

You are one of six senior analysts in the Research and Economic Analysis Unit at the New York headquarters of Sloan Corporation, a large, diversified financial services company. You report to Chris Dowd, vice president of the unit, which also includes twenty analysts and a support staff of nine.

As a staff department, Research and Economic Analysis provides routine forecasts and analyses to various departments of Sloan Corporation, as well as to the company's six regional offices. Its products range from a weekly economic forecast, issued after a forecast meeting that occurs every Monday morning, to analyses of a specific company involved in merger and acquisition activities, produced at the request of the Corporate Finance Department.

You have just come from a meeting of the company-wide Technology Committee, where you learned that in two weeks a new policy will be put into effect requiring all employees below the level of VP to use Meeting Maker to keep their calendars. (VPs and senior management may choose to use Meeting Maker or not depending on their own preferences.) While Meeting Maker has been available in the suite of software the company gives each employee, it has not been mandatory to use it or any other scheduling software. This, then, is a shift in policy.

Information about Meeting Maker

Meeting Maker, according to its developers, is a "group scheduling tool." It allows users to keep their calendars in an electronic format, and it makes accessible the times they are and aren't available to other Meeting Maker users who are networked together. This second feature is especially helpful in scheduling meetings without having to exchange endless e-mails or phone messages. In addition to these functions, Meeting Maker allows users to put items from a "to do" list on their calendars, lets people have access to one another's calendars, and permits them to assemble lists of contacts. Users have the option of viewing one through fourteen days of their calendars on one screen or seeing an entire month at once. Colored labels can be applied to highlight important meetings, deadlines, regularly scheduled events, etc. The calendar navigator function permits viewers to go to any day of the year to see what is scheduled for that day.

Meetings can be arranged as follows: From the file menu, select "Propose Meeting" (Ctrl +M). A screen will appear with boxes labeled: "Proposal," "Title," "Location," "Guest," "Schedule," "Agenda," "Options." First, enter the title of the meeting and its location. Then identify who is to be invited by selecting the "Guest" box. The list of all people who are on Meeting Maker appears. Chose those people who are either "required" to be at the meeting or are "optional." A date and time for the meeting can be identified under "Schedule." An "Auto-pick" option (also under "Schedule") asks the program to canvass the calendars of each person invited to the meeting in order to find the first day and time everyone is available. "Agenda," as its name implies, allows the person calling the meeting to list the topics to be covered. "Options" permits users to ask Meeting Maker to remind them when the meeting is to take place, as well as to decide whether this meeting is to be "private" (i.e., other people will know a particular time slot is taken, but they will not know what activity is taking place during that time); "publishable"; or "flexible" (i.e., the time slot is taken, but it could potentially be used for another meeting).

People who use Meeting Maker can designate anyone else as their "proxy," that is, someone who has access to their calendars. According to the Meeting Maker help page (by the way, Tech Support tells you that Meeting Maker help pages are very easy to understand), "Proxies can keep track of meetings and activities, and can print your calendar for you." Proxies can be designated as "Read/Write" or "Read Only." "Read/Write" proxies can change the user's calendar; "Read Only" proxies can only view the calendar. It is possible to label certain activities and to-do items as private to keep proxies from viewing them. Select proxies by going to the "Edit" menu and choosing "Proxy List."

The Technology Committee has asked the IT department to offer a set of one-hour tutorials to help staff learn to use Meeting Maker.

Your Task

You need to write two memos about this impending change.

The first is to Chris Dowd. While not a technophobe, Dowd tends not to like to take the time to learn how to use new technology (either hardware or software). And since she has an administrative assistant who keeps her calendar, it is not likely she will use Meeting Maker herself except perhaps to check her calendar. You also know that Dowd likes to have information distilled down for her—she doesn't like to have to wade through the details of every project. By now you know the best strategy for dealing with her is to get to the point, and you try to keep all memos to her to less than a page.

The second memo is to your peers and subordinates in the Research and Economic Analyses Unit. You can imagine that some of them may already be using Meeting Maker, some of them will be glad to adopt it, and some of them may be resentful that they are being forced to move from a paper-based calendar to an electronic one. Therefore, this memo has to be both persuasive, stressing the advantages of the software, and informative, explaining at least the rudiments of how to use it.

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