Calendar Management Questionnaire

Instructions

Follow the directions below to save your copy if you are not automatically promoted.

1. To save a personal copy to your Google Drive and edit it, select File > Make a Copy > Rename the document and save. (Please do not send "share requests;" you must create your copy.)
2. We strongly recommend that you save this in the folder with all of your VA Program resources.
3. To save as a Word doc or PDF, select File > Download > Save in the format you desire.

Question to ask yourself

1. What does your client's calendar currently look like?

2. Is there a pattern you are seeing, e.g blocks of time that are left empty, recurring meetings?

3. Are there names that show up more often than others in your client's calendar? These might be priorities.

4. Does your client use the same calendar for personal things, eg, dinner, tennis games, etc?

5. How do they currently differentiate online meetings and those that are in person?

6. How do they label meetings e.g *Call: Prudence<>Nicole* or *Call: Nicole (ALX) & Pru (EAH)*

7. What can you do with the permissions you have been given? Can you send and accept meetings using their calendar, or can you only add meetings?

Questions to ask your client

1. What do you need me to help you with the calendar? E.g. Setting up meetings, moving meetings and/or accepting meetings.

2. How many calendars do you use, and do they auto-sync? For example, do you use Google Calendar on the computer and iCalendar on the phone?

3. What does your typical day look like?

4. Which times work for you to have meetings?

Calendar Management Questionnaire

5. What is the earliest and latest you can take meetings?

6. Which hours do you spend focusing (no meetings), having meetings, or attending to personal things?

7. Do you need gaps or breaks in between meetings? If so, how long? E.g 5 minutes, 10 minutes, etc

8. For online meetings, do you prefer Google Meet, Skype, Zoom, Teams, or Facetime?

9. Is Google Meet, Skype, Zoom, Teams, or Facetime already auto-connected to your calendar, if not may I connect them?

10. Which online meetings are recorded?

11. For direct calls, do you prefer to call people, or should they call you?

12. Do you have any specific time zones you frequently work with?

13. Do you prefer using your personal cellphone or office line?

14. Which meetings/ stakeholders are a priority to you?

15. Do you have any recurring meetings and appointments?

16. What information do you need from me before each meeting, and how well in advance do you need it? How detailed do you need it to be?

17. Do you want travel time added to your calendar so you know when to start going to in-person meetings?

18. Do you want me to send out meeting invites using your calendar, or would you prefer that I use my calendar to set up meetings?

19. What are your preferred tools or apps for scheduling, for example Calendly, Motion or Google Scheduler?

20. How do you prefer to receive updates or changes to your schedule?

21. How flexible are you with last-minute changes or cancellations?

22. Are there any specific days or times reserved for personal commitments?

23. Will you or someone else add meetings to the calendar or will I be the only one adding meetings?