

Schedule a Meeting with a (Changing) Subset of Your Members

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Imagine you are the host of a business community.

On a regular basis, you need to schedule a meeting for a subset of your members. However, the purpose of the meeting changes, so the composition of the subset changes, too.

Without thoughtful automation, scheduling such a series of meetings can be an administrative headache.

More importantly, the process can frustrate your members.

The objective of process automation is to reduce friction in the form of effort and reactance on the part of your members.

Effort is a function of exertion

and ambiguity.

Reactance is a negative response to feeling constrained or coerced.

As process designers, it's important to find ways to make things clear and easy, while offering flexibility to our members.

Here's a flow chart of a process that uses Calendly, Airtable, Zapier, and Gmail.

The first task is to create a meeting poll.

I've logged into Calendly. I'll click create; select meeting poll. I'll make it a one-hour meeting, and I'll select three alternative times. Click next. We'll give it a meeting name, and I'll make this a Zoom meeting. Now, I'll publish the poll.

The link that's shown here is an abbreviated version of the URL that we're going to need. So, I'm going to close this popup. Refresh the page. Open the meeting details. Click the view active meeting poll. Then, I'm going to copy this entire URL, which importantly has this "month equals" extension.

Next, we'll select the invitees from our total community roster. What I've created here is a simple Airtable base that includes some randomly generated names and some fake email addresses for purpose of illustration. Then I have a checkbox field for send meeting poll.

Let's just select a few people. It represents the subset of our total community that we want to send a meeting poll link to, and now we're ready for the next step.

Now it's time to create the draft email invitations to the selected community members.

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So I have Gmail open in Chrome. I'll open up the Zapier Chrome extension. I'll paste the Calendly link, give a poll deadline, and click send. The push app has been initiated. I can close that window. After a few moments, we can refresh the page, and our draft email invitations are now visible.

Here's the Zapier automation that creates the draft invitation emails. It's triggered manually using the Zapier Chrome extension. The first action is a search on the Airtable database. What the search does is go through all of the records in the designated table and brings back the record information for those records that contain a checked box in the send meeting poll field.

Airtable has an integration with Zapier that supports finding multiple rows, but that's subject to a maximum of 10 rows. So, if you have more than 10 names checked, you need to use a different tool.

One that I find is really useful is called On2Air. In this case, you create a specification that looks for the send meeting poll, and you configure it so it looks for a send meeting poll field that's checked, and then it returns up to 500 records, for example, rather than 10 that the native Airtable-Zapier integration supports. That's what this step does, and what it returns is a list of all the records and all the fields that match those criteria.

Then what the automation does is loop through each of those records in sequence and, for each of the matching records, does the following steps. So the Encode Name and Encode Email actions just take plain text, " Joe [space] Blow," and encode it for use in a URL, "Joe [percent-two-zero] Blow." The reason for that is we want to create a URL that augments the Calendly meeting poll link with the name and the email of the invitee. These two steps encode that text information.

Then the heart of it is creating a draft in Gmail. You can use a plain text or an HTML body type. I've selected HTML. Then you can insert information into each email dynamically. In this case, the first name of the invitee is inserted at the top of the email.

The key bit is this link. It takes the basic Calendly meeting poll link and augments it with this information. The "ampersand name equals" that formatted first name, last name of the recipient, and then the email of the recipient. That way, everybody's email is personalized, not just with their name, but also with a Calendly poll link that allows for the pre-population of that form, which just makes it easier to complete, especially on a mobile device, and reduces friction.

Once the email invitations are sent it's time for the recipients to complete the meeting poll.

When the member receives her email invitation, there's an unambiguous call to action: "Click here to complete the meeting poll." That takes her to the Calendly meeting poll landing page where she can select the times that work for her. Click next. Now, because we've incorporated the information in the personalized URL, the member doesn't have to re-enter her name and email address. Click share times, and she is taken to the confirmation page.

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The next step is to select a meeting time.

Upon the passing of the poll deadline, the host can go back into Calendly, find the time that has the most appeal, and book it.

The scheduling process ends when confirmation emails are received by the participating members.

Those members who responded to the meeting poll will receive an email that's automatically generated by Calendly that includes confirmation of the date and time as well as, in this case, a Zoom meeting link.

Scheduling meetings can be time-consuming and frustrating. Thoughtful application of process automation can help. Whichever tools you use, make it easy, make it clear, and provide choice whenever possible.

Want to learn more? Let's chat.