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1. Introduction

LessMeeting makes it extremely easy to follow meeting best practices for planning, execution and follow-up, while also providing key analytics that measure meeting productivity and efficiency across your organization. Stop letting meetings ruin your work day. Less meeting. More productivity.

1.1. LessMeeting

LessMeeting is comprised of two main applications: the web application is where you take all of your notes and can view analytics, while the primary function of the Outlook client is for setting up meetings.

1.1.1. Installing the Client

To install the client, download it from the LessMeeting website, http:///www.lessmeeting.com. If you have not already done so, you will need to register for an account.

Once you are a registered user, login to the LessMeeting website and then go to the Settings page and scroll to the bottom. Click the "Re-download the Microsoft Outlook 2007/2010 Plug-in" link and the Outlook client will be downloaded and installed automatically.

1.2. Agenda, Goals, and Tags

For each meeting you create in LessMeeting, you have the opportunity to create agenda items, goals, and tags. These three items help plan and execute the meeting more efficiently.

1.2.1. Agenda

Agenda items allow you to structure the meeting by specifying topics that will be covered in a certain order for a certain amount of time.

1.2.2. Goals

Goals allow you to set objectives and expectations for the outcome of the meeting. Each meeting should have one or more clear objectives.

1.2.3. Tags

Tags are used to specify the subject matter of the meeting and can later be used when searching for meetings as well as analyzing the effectiveness of your meetings.

2. Setting Up a Meeting in Outlook

Setting up a LessMeeting meeting is accomplished the same way you would normally create a meeting, but with additional steps to add the data that LessMeeting needs to enable the meeting to become more effective. When the meeting email is sent the agenda, goals, tags, and meeting content are automatically synchronized with the LessMeeting website.

2.1. Creating a New Meeting

Navigate to the Outlook Calendar and either click the New Appointment button at the top or double-click the calendar.

Add the subject, the meeting body, the location, the attendees, and the time of the meeting. The LessMeeting client is at the bottom of the meeting screen.
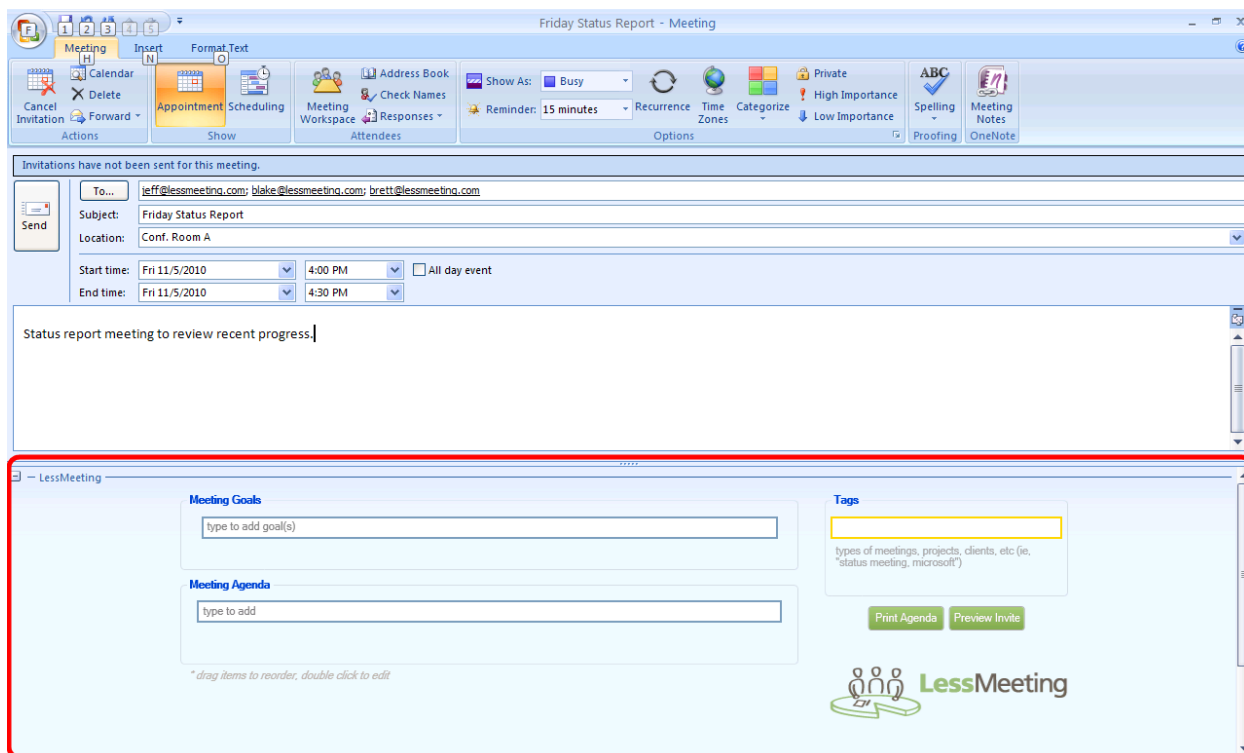
LessMeeting User Guide

Figure 1: New Meeting

2.2.   Adding Items to the Goals

To add items to the Goals click on the Goals textbox and type in the first item, then press enter to save it.
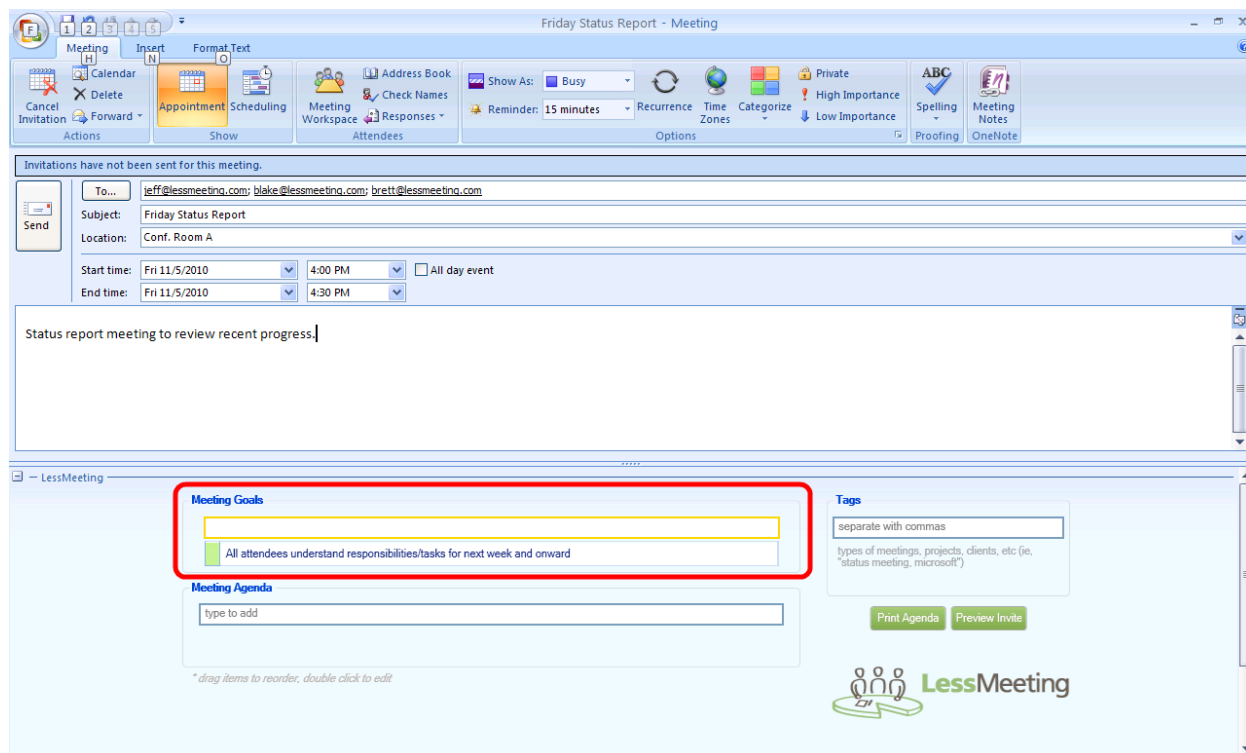
LessMeeting User Guide

Figure 2: Meeting Goals

The order of the goals can be modified by dragging and dropping.

To delete a goal click on it once and then press the delete button. Alternatively, you can right-click on the agenda item and select Delete Goal.

2.3.   Adding Items to the Agenda

To add items to the Agenda click on the Agenda textbox and type in the first item, then press enter to save it. You can alter the time for this agenda item by changing the slider to the right. Continue with this process until all agenda items are added.
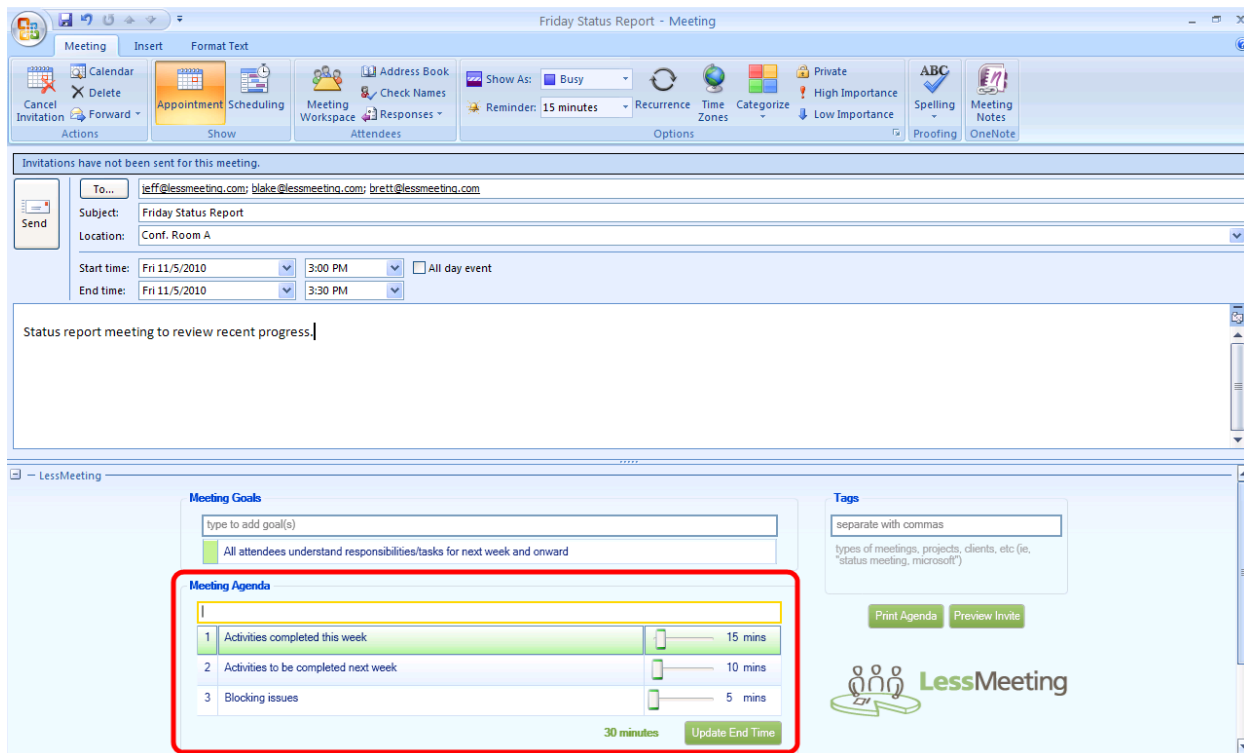
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Figure 3: Meeting Agenda

As agenda items are being added, the total time is display at the bottom of the Agenda section. Additionally, the Update End Time button exists to change the meeting end time based on the total minutes allocated in the agenda. For example, if the meeting is originally setup for 2:00pm – 2:30pm and the agenda has 4 items totaling one hour, clicking the Update End Time button will change the meeting time to 2:00pm – 3:00pm.

The agenda order can be modified by dragging and dropping.

To delete an agenda item click on it once and then press the delete button. Alternatively, you can right-click on the agenda item and select Delete Agenda Item.

2.4. Adding Tags

A tag can be added by typing in the Tags textbox. More than one tag can be added and tags should be separated by a comma.
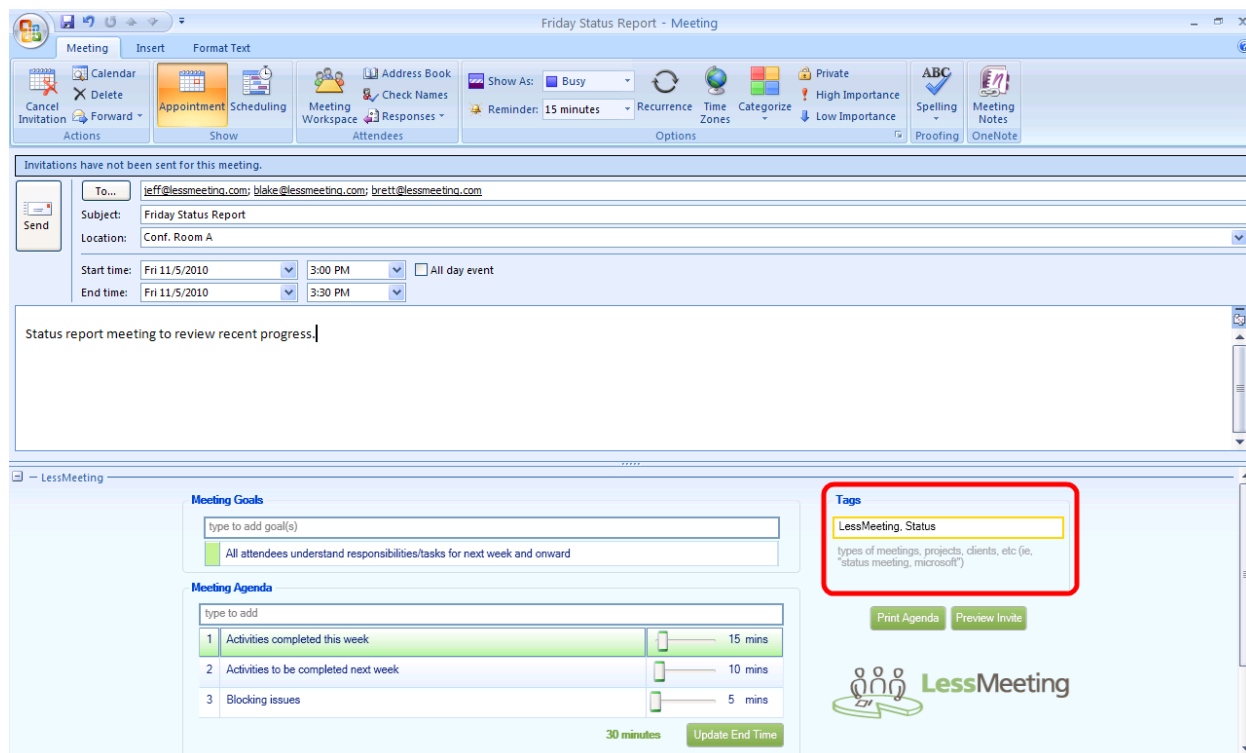
Figure 4: Tags

Tags can be individual words or phrases. For example, a tag for a weekly status meeting about tracking projects in the IT department could be: *Status Meeting, IT*

2.5.   Print Agenda

Clicking the Print Agenda button will generate a PDF file with all of the meeting information. This is useful if you cannot bring your computer to the meeting or do not have internet access to take meeting notes online.
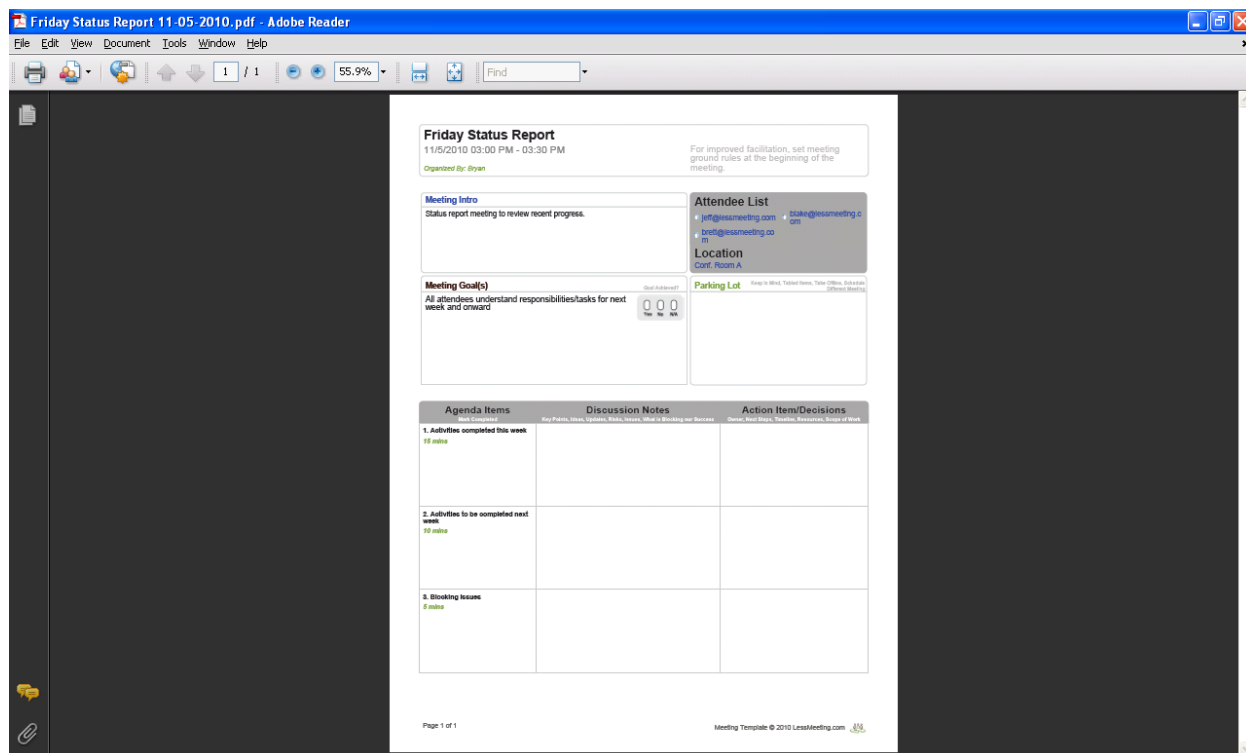
Figure 5: Print Agenda

2.6. Preview Invite

Clicking the Preview Invite button to add the Goals, Agenda, and Tags to the bottom of the meeting body so that all of the attendees will see this information even if they do not have LessMeeting. This text will automatically be generated when the meeting is saved and/or sent if the Preview Meeting is not clicked.
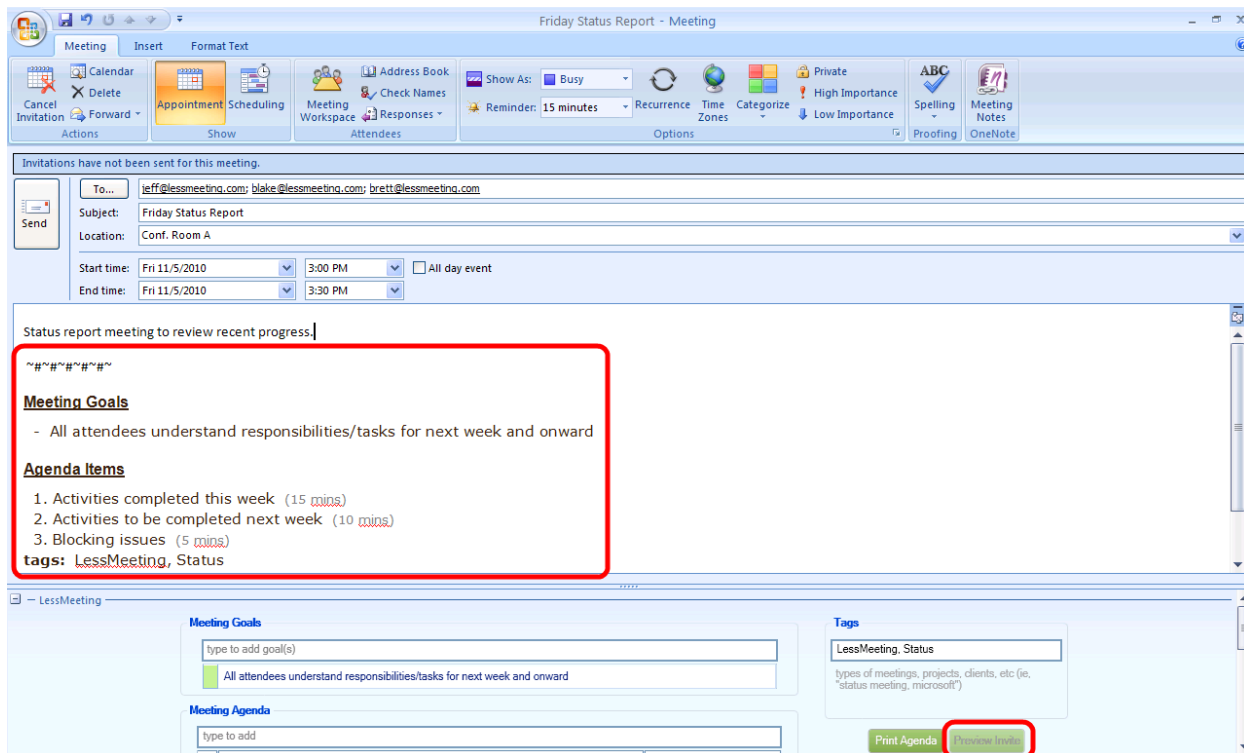
Figure 6: Preview Invite

2.7. Making Change to the Meeting

If you make changes to the Goals, Agenda, or Tags in Outlook the changes will automatically be saved and synchronized with the LessMeeting website when you close the meeting. There is no need to re-send the meeting invitation to all of the participants.

2.8. Meetings Sent from Others

Meetings sent from others that you accept or reply tentative for will automatically be added to the LessMeeting web application to allow you to take notes.   You can add Goals, Agenda items, and/or Tags to these meetings even though you did not create them and the information will be saved when you close the meeting.

2.9. Recurring Meetings

Recurring meetings, or series, that are created with agenda items, goals, and tags will retain that data from meeting to meeting. Additionally, any action items assigned in the previous meeting will appear at the bottom of the meeting page in the Action Items section.

2.10. Attachments

Attachments can be added to the meeting page either before or during a meeting by clicking the "Upload file(s)" button. The meeting notes will contain a link to the file so participants can access the file.
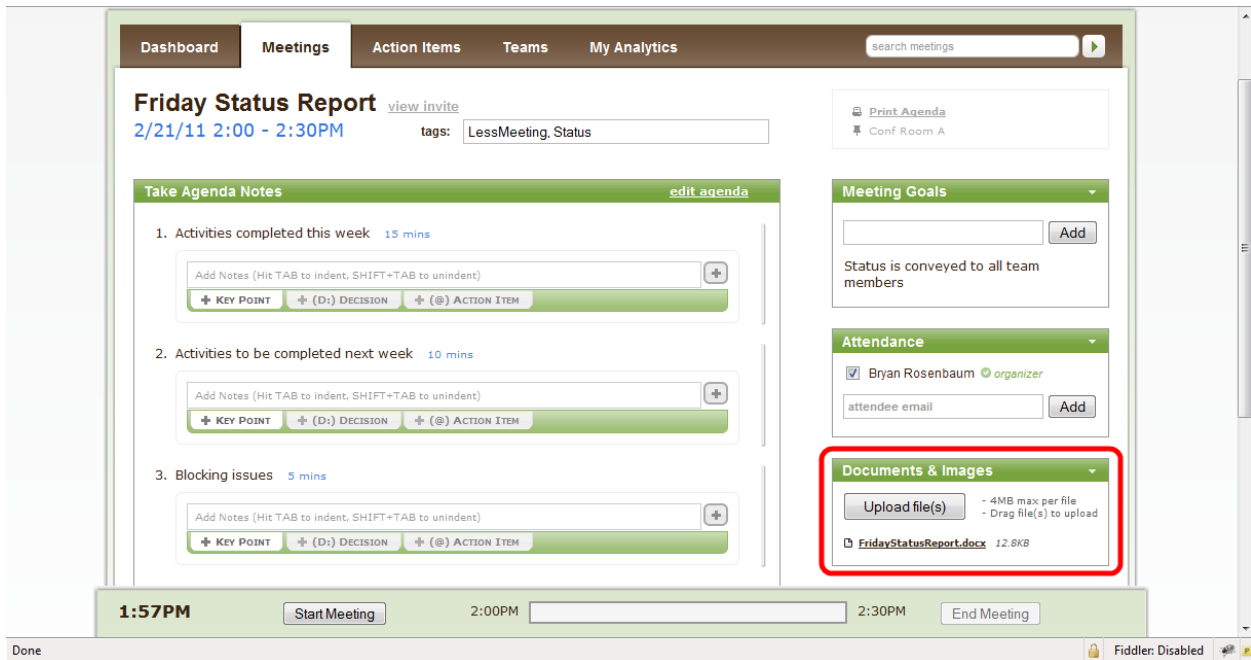
Figure 7: Using Attachments

3. Setting Up a Meeting without the Outlook Client

3.1. Create Meeting on Dashboard

If you need to create a meeting on the fly and don't have access to Outlook you can click the New Meeting button on the dashboard.
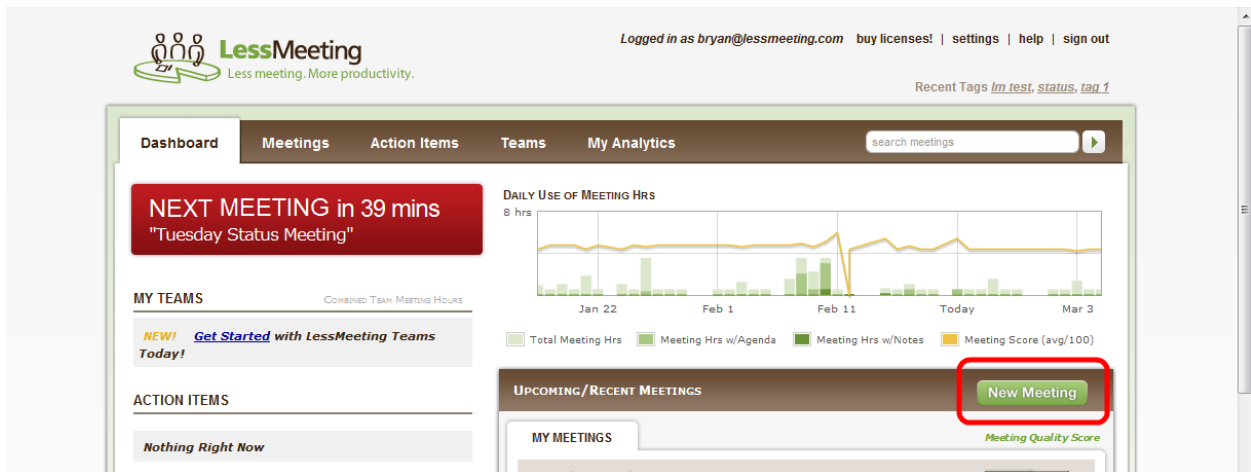

Figure 8: Create a New Meeting through Website

The Schedule a Meeting page with fields for the subject, location, date/time, attendees, and message body. The page also has fields for the LessMeeting information: tags, goals, and agenda items. After clicking the Create Meeting button at the bottom of the screen, the meeting page will appear. You will also receive an email containing a calendar file that will allow you to add the meeting to Outlook.

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Figure 9: Entering New Meeting Information

3.2.   Copy add@invite.lessmeeting.com

If you do not have the LessMeeting Outlook add-on installed or are accessing your mail through the Internet, you can still include Goals and Agenda items to the meeting so that you can later take notes online. To do this, add the email address add@invite.lessmeeting.com to the invite list for the meeting. You can add Goals and Agenda items in the following format:

> Goals:
> 1. Goal One
> 2. Goal Two
> 3. Goal Three
> …
>
> Agenda:
> 1. Agenda Item One (5 min)
> 2. Agenda Item Two (1 hr, 15 min)
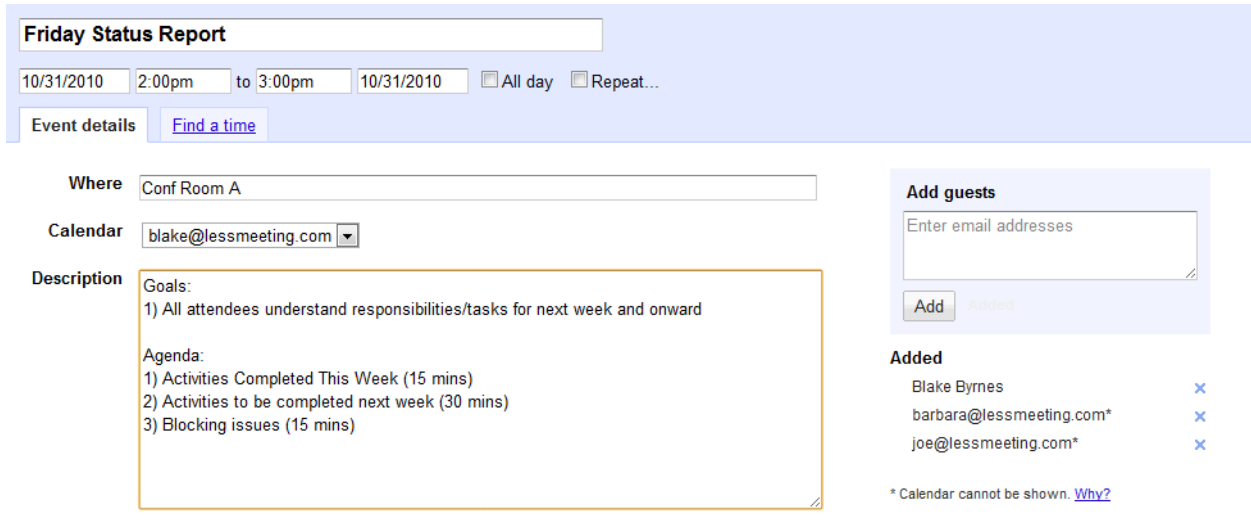> 3. Agenda Item Three (10 min)
> …

Figure 10: Creating Meetings without LessMeeting Client

4. Note Taking During Meeting

4.1. Opening the Meeting

There are many ways to access the upcoming meeting, but the three easiest are:

1. When Outlook displays a meeting reminder popup within 5 minutes of the meeting, a notification will appear and have a "Take Notes" button that will open the meeting page in a browser window.
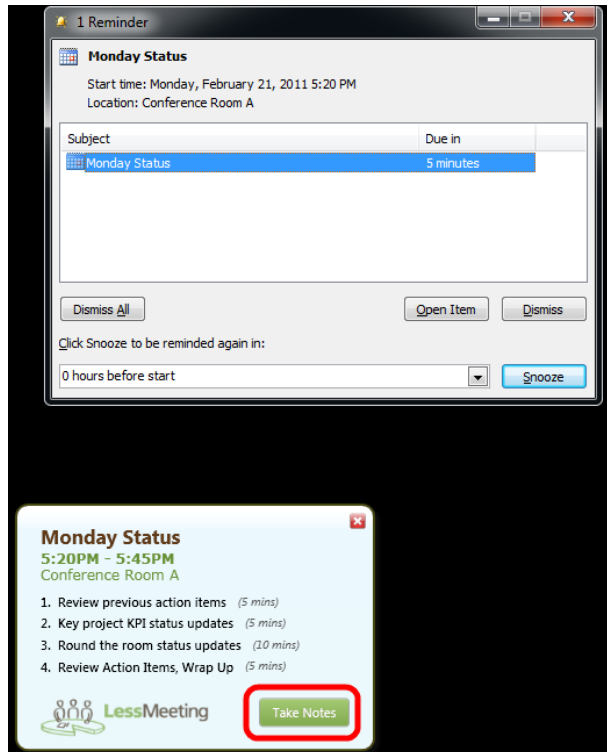

Figure 11: Meeting Notification

2. Open the meeting in Outlook and click on the *Go to Meeting Space* button in the bottom left corner.
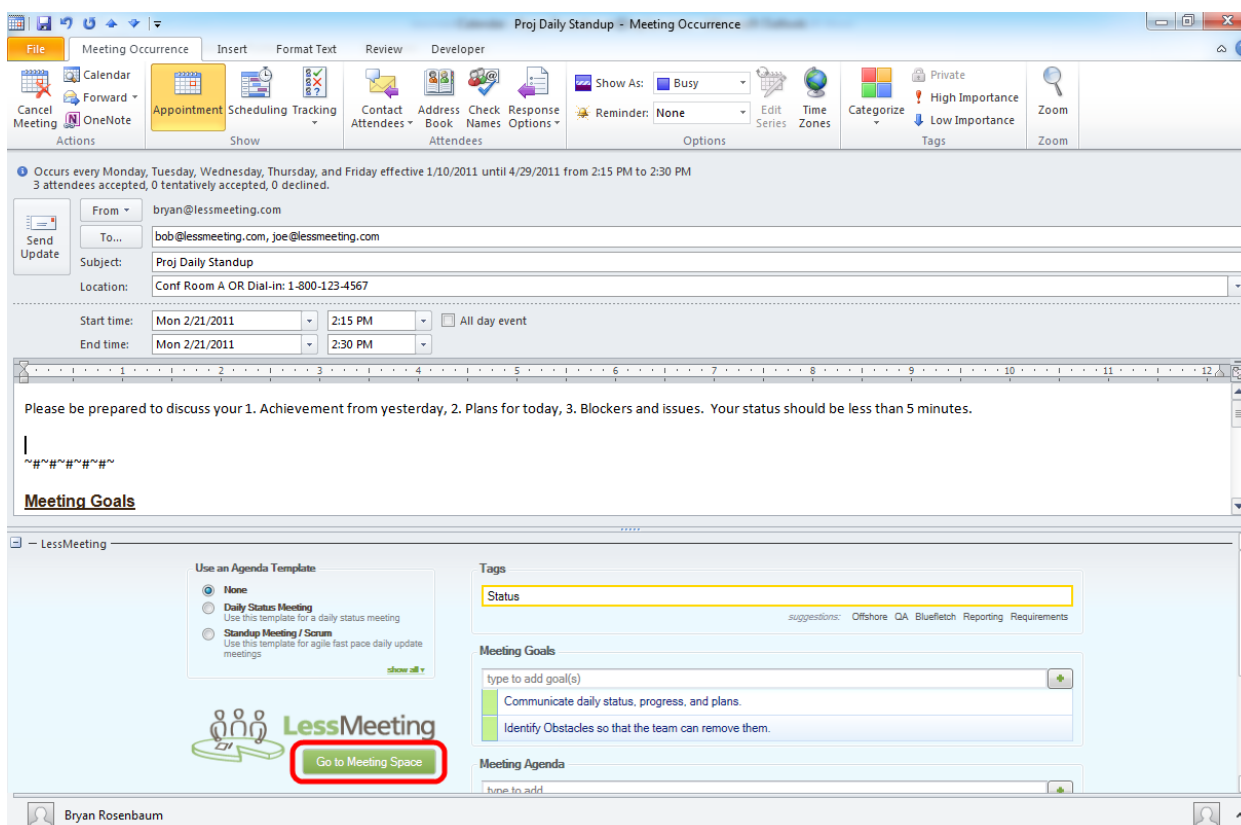

Figure 12: Go to Meeting Space

3. Login to the LessMeeting website and the next meeting will be displayed in the upper left corner with a countdown to the hours/minutes until the meeting starts. The meeting also appears in the Upcoming meetings section on the right.

Figure 13: Next Meeting

When the meeting page opens, you will see all of the agenda items, goals, and attendees that were previously collected in the LessMeeting Outlook add-in.

4.2. View Invite

Sometimes it is helpful to view the meeting invitation sent out to get some background on the meeting or to check what the dial-in number is. This can be done in LessMeeting by clicking the View Invite button next to the title of the meeting.
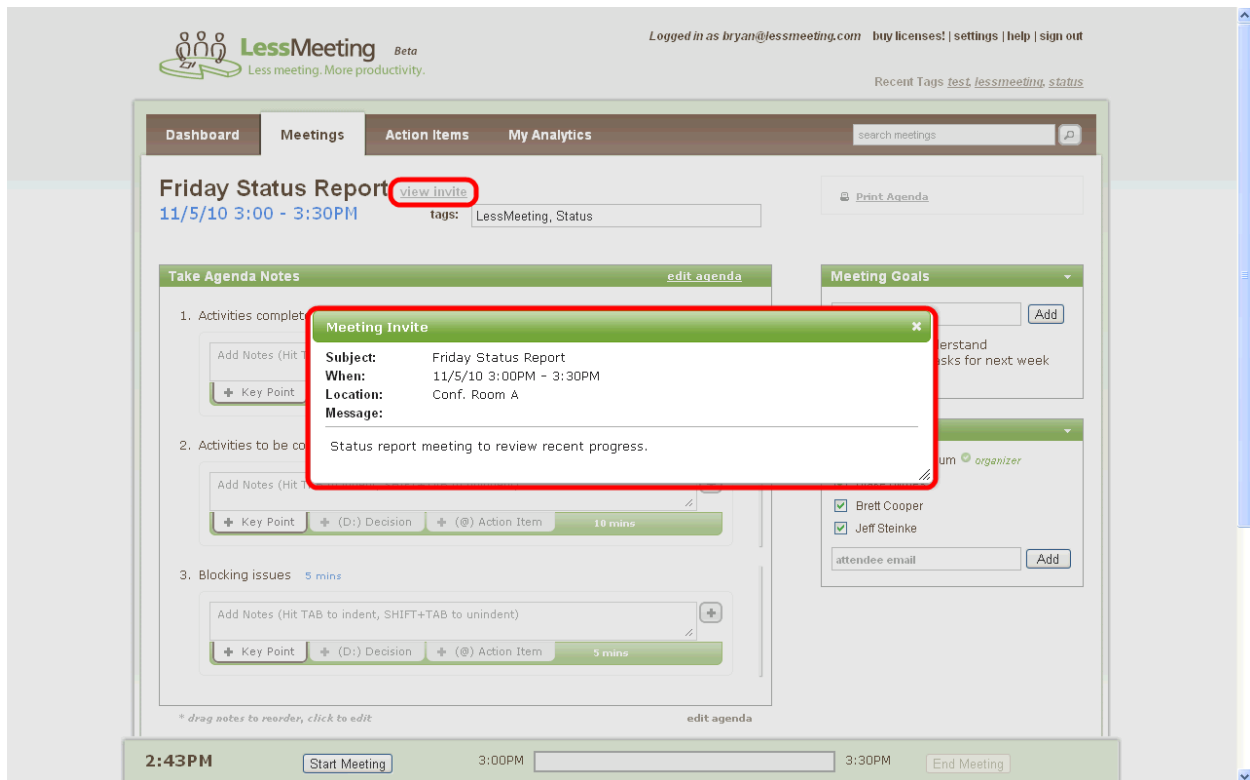
Figure 14: View Invite

4.3.   Starting the Meeting

When you are ready to start the meeting click the Start Meeting button at the bottom of the screen.
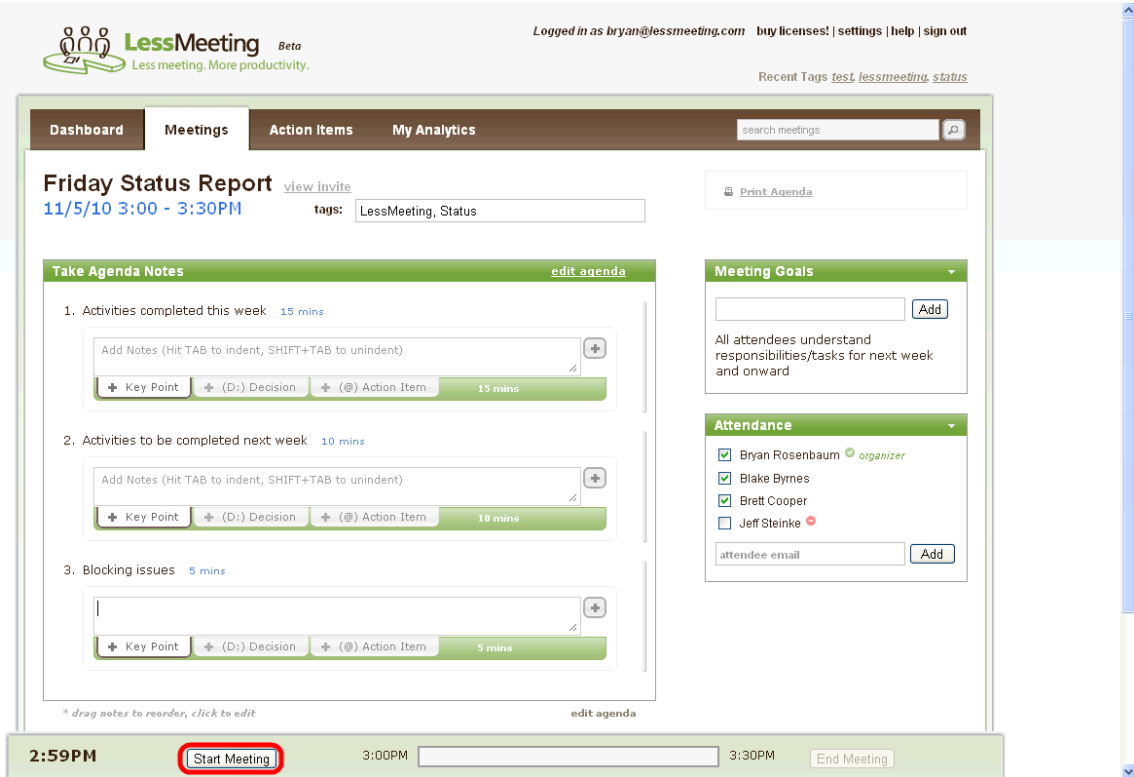
Figure 15: Start Meeting

After starting the meeting the bar at the bottom of the screen helps you keep track of time by showing the current time and how much time is left in the meeting. There is also a tracking bar to show the progress of the meeting.

Note: if you start typing meeting notes without clicking the Start Meeting button, LessMeeting will prompt you to start the meeting.

4.4. Attendees

The meeting attendees are shown on the right side of the screen with checkboxes. This allows you to capture who showed up to the meeting and who did not.

Figure 16: Attendance

This list contains all of the individuals invited to the meeting. The icons next to each person's name indicate whether they accepted or declined the meeting invitation. People who have accepted the meeting will have an 🔵 icon next to their name while people who have declined will have an 🔴 icon. For recurring meetings, each person's historical meeting attendance will also be displayed.

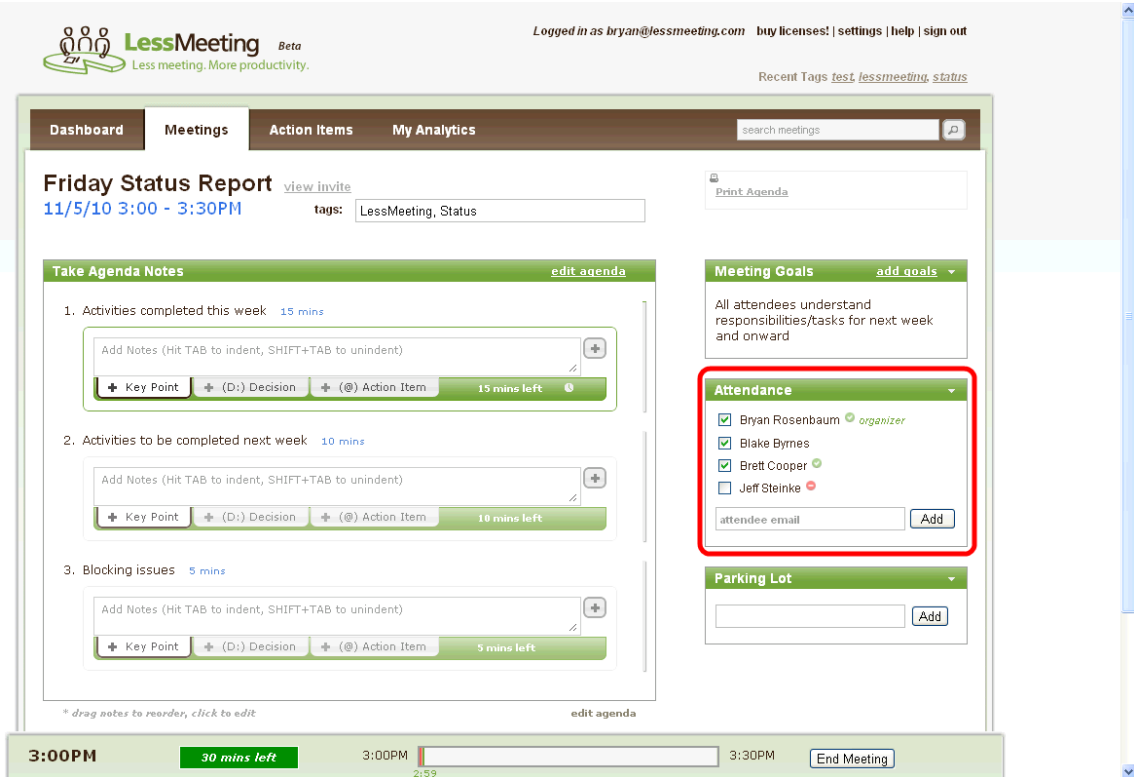There is a textbox that allows you to add one or more people to the meeting if they were not on the invite list.

4.5.   Taking Meeting Notes

Meeting notes are taken in a bulleted/tree structure under each agenda item. Within the meeting notes you can add action items that are assigned to individuals and specify when decisions are made.

4.5.1. Navigating the Notes Structure

Under each agenda item there is a large textbox that allows you to add notes. Type your notes in this area and then click the Enter button to save the notes and go to the next line. You can alternatively click the ➕ icon to save the meeting notes instead of pressing Enter.

Figure 17: Navigating the Notes Structure

To create a sub-note so that it is nested under the previous note press the Tab key before, during, or after typing in the note and then press Enter. Pressing Shift-Tab will outdent the note. You can also hover over the meeting note after saving it and click the ⬅ and ➡ icons to change the indent.
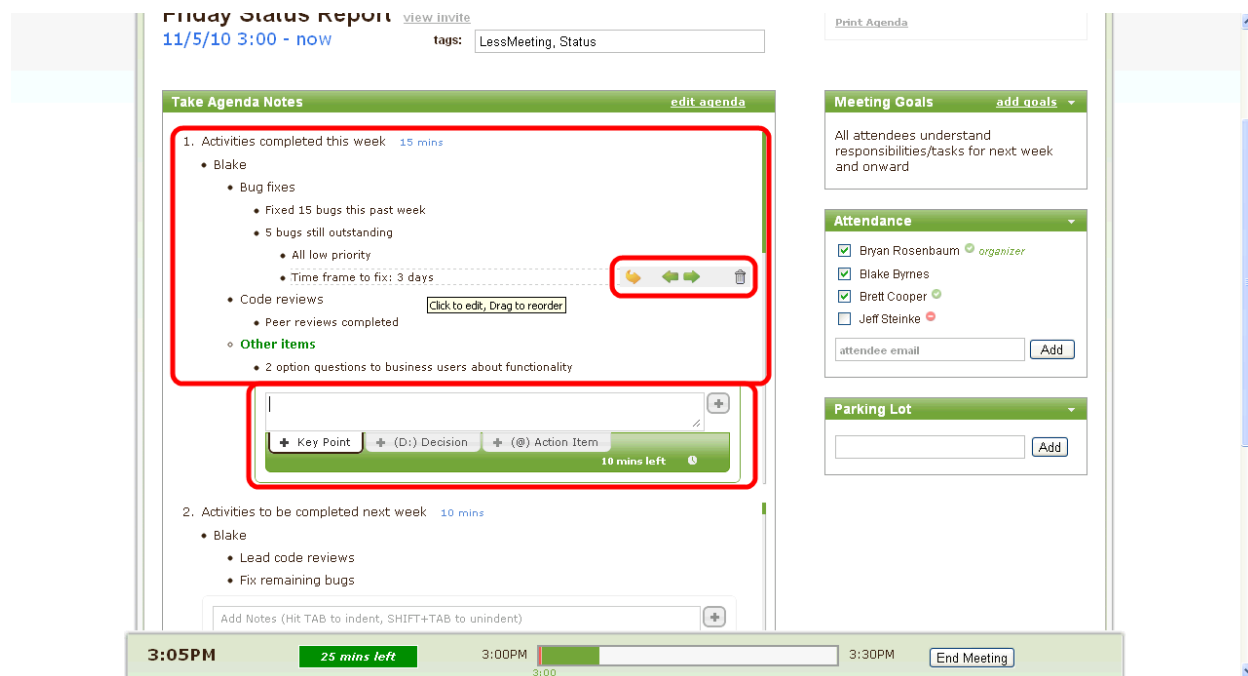
To add a sub-note to an existing note hover over the parent note and click the ↩ icon . This will move the note textbox below the parent note and you can continue adding notes from that point in the structure.

To delete a note hover over it and click the 🗑 icon.

To move a note and any sub-notes that exist below it, drag-and-drop the meeting note. Notes can also be dragged to different agenda items.

To edit an existing note click on it once and it will become editable. Make your changes and either press Enter or click the ⊕ icon to save the note.

4.5.2. Time Tracking Agenda Items

Each agenda item keeps track of how long you have been taking notes in it for and displays how many minutes are left or how many minutes you are over the planned time. This helps to ensure that all agenda items are being covered during the meeting in the specified time.

4.6.   Editing Agenda Items

Agenda items can be added or removed at any time by clicking the Edit Agenda link at the top of the Taking Agenda Notes section. This will display a table that allows you to add new agenda items, delete agenda items, change the order of the agenda items, or change the amount of time for the agenda items.

4.7.   Action Items

Action items are assigned to meeting attendees to track their follow-up items. In LessMeeting, action items can be added either within the meeting notes or at the bottom of the meeting page.

To add an action item within the agenda section either click the (@ Action Item) tab below the note textbox or type the character @. Start typing in the person's name who you are assigning the action item to and LessMeeting will auto-complete the name. Press Enter to save the person's name, then type the action text that you are assigning to that person (i.e. "Talk to finance team about project budget for next year." Finally, set the date by which the action item is due and click the ⊕ icon to save.
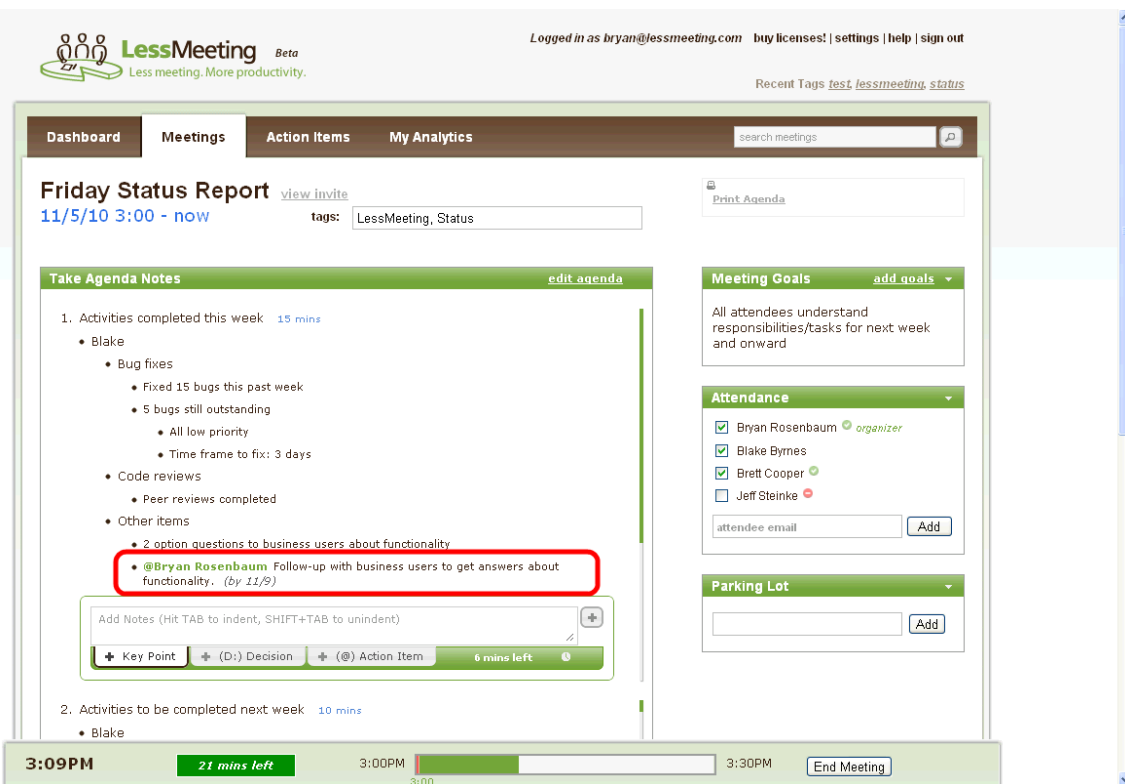
Figure 18: Action Items in Notes

Action items can also be assigned to multiple people by typing the @ symbol before each person's name. For example, to assign an action item to Joe and Pete type "@Joe @Pete Follow-up about budget results."

Action items can also be assigned at the bottom of the meeting page. This is useful when creating follow-up items for the next meeting outside the context of the agenda items. Note that all agenda items added in the meeting notes are automatically added to the Action Items section at the bottom of the page.
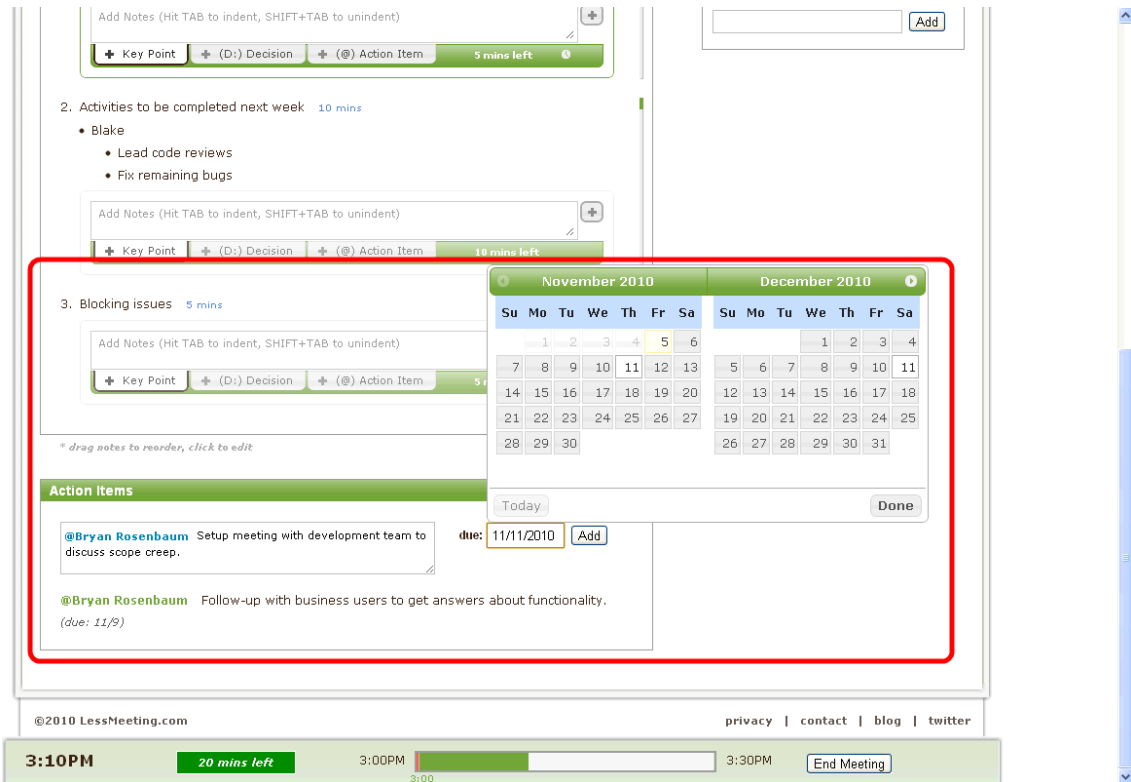
Figure 19: Action Items at Bottom of Page

Action items will show up in the daily digest. When action items owed to you are completed, a section in the daily digest will show alert you of the task being completed.

4.8.   Decisions

To highlight decisions that are made during the meeting you can click the Decisions tab below the meeting notes textbox or type *D:* at the beginning of the notes. Decisions will be highlighted and bolded in the meeting notes to show their importance.
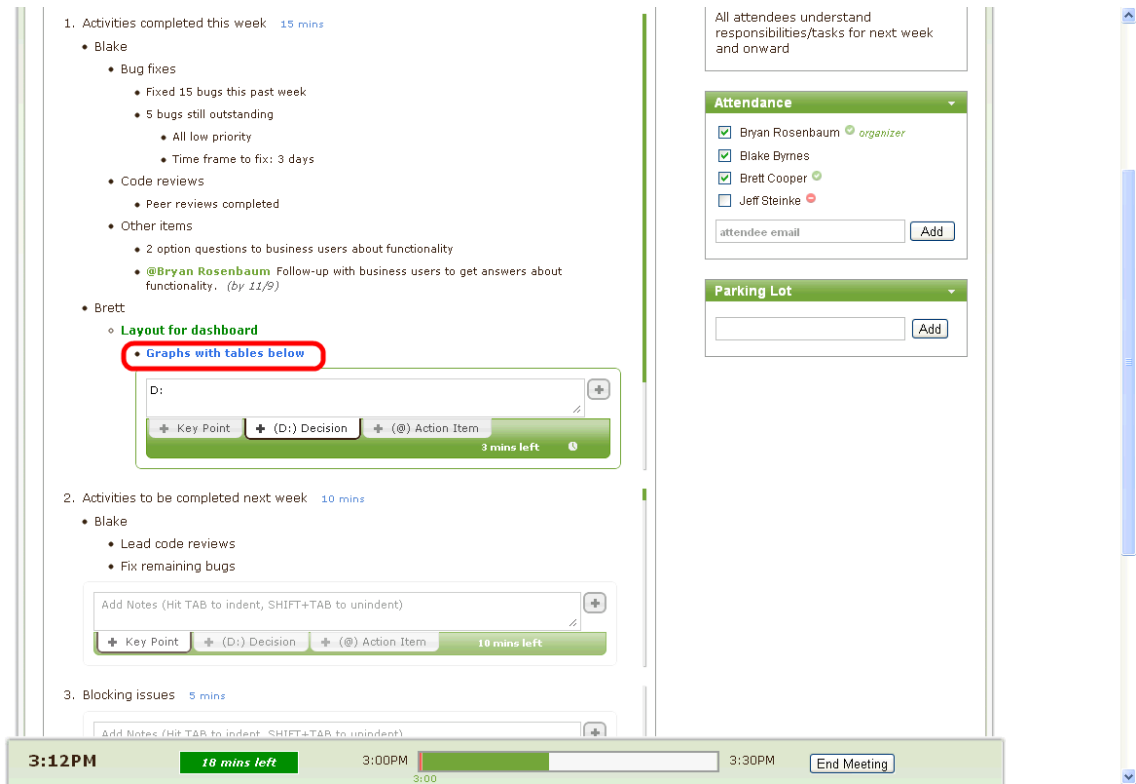
Figure 20: Decisions

4.9. Parking Lot

Discussions that are not included in the meeting agenda but are important and should be brought up at a later time should be added to the parking lot on the right side of the screen below the attendance. Items can be added to the parking lot by typing text into the textbox and either pressing Enter or by clicking the Add button. Items can be edited by clicking once on the text, or can be removed from the parking lot by hovering over them and clicking the 🗑 icon.
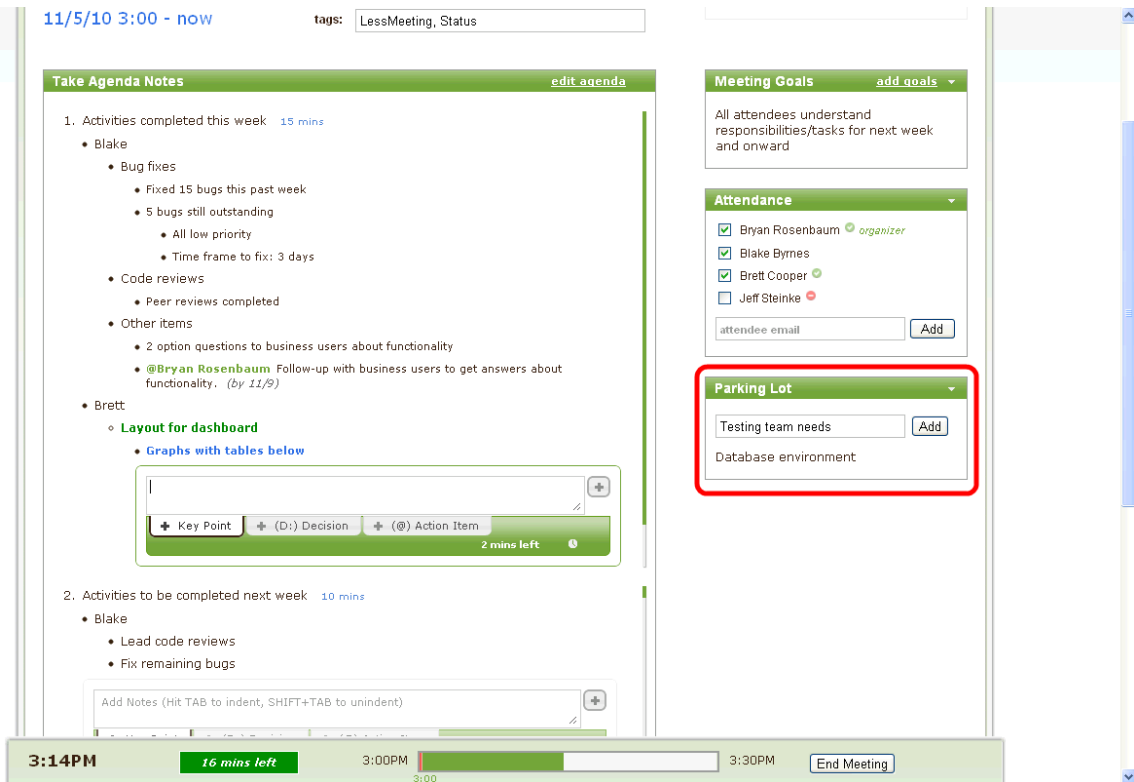
Figure 21: Parking Lot

4.10. Multiple LessMeeting Users in the Same Meeting

LessMeeting allows multiple people to take notes simultaneously if they have LessMeeting accounts. The meeting notes are updated in real-time on everyone's screen.

5. After the Meeting

5.1. End/Close Meeting

When the meeting is completed click the End Meeting button on the bottom of the screen. This will cause a screen to appear asking you if the goals for this meeting were achieved (if any goals existed). Keep the Yes checkbox checked if the goal was achieved, or uncheck the checkbox and select a reason from the dropdown list.
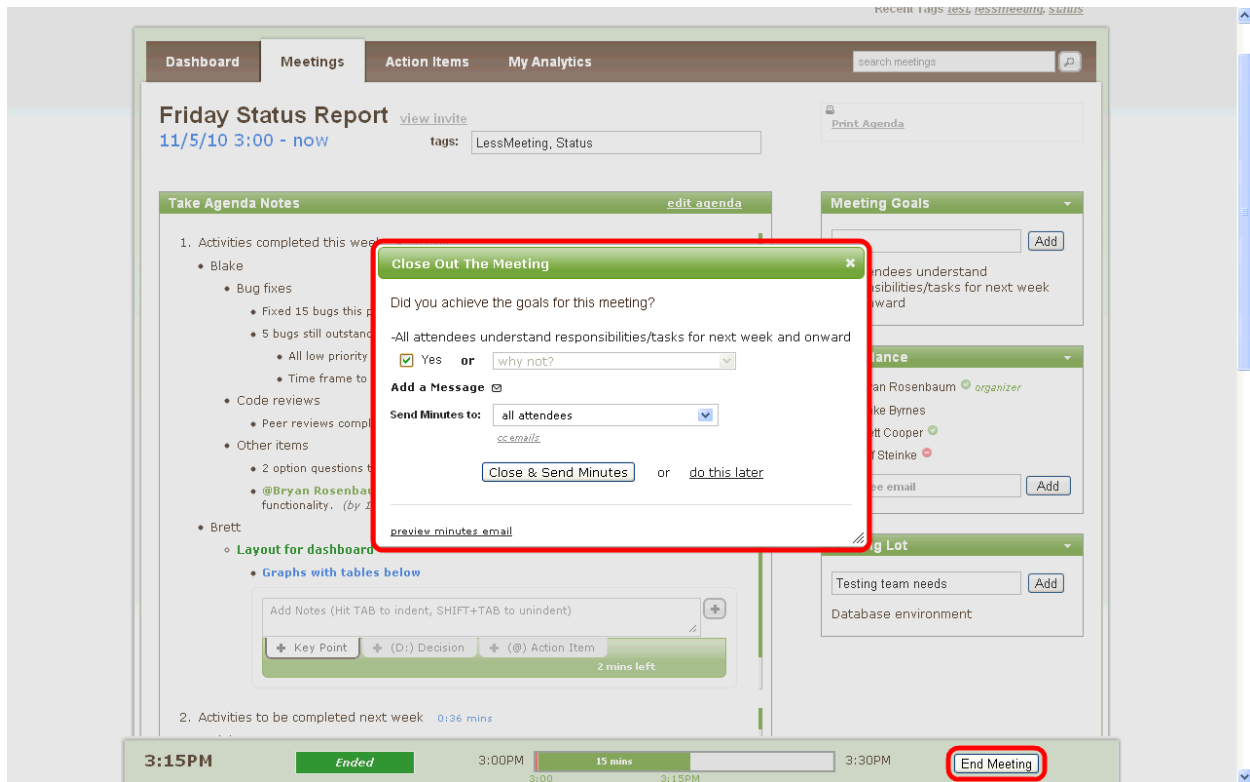
Figure 22: Close Meeting

You can choose the meeting minutes to be emailed to all attendees, attendees from your company, or just yourself from the dropdown. You also have the option of adding a custom message to the email by clicking the *Add a Message* link.

When you are done press the Close & Send Minutes button. Alternatively if you would like to make changes to the meeting notes and send the meeting minutes later you can click the *do this later* link.

Once the meeting is closed you can no longer add agenda items, add goals, or modify the attendance. However, you can still add and edit the meeting notes.

5.2. Meeting Quality Score

After a meeting is closed a Meeting Quality Score, or MQS, is calculated and displayed on the meeting page. The score will show both positive and negative attributes of the meeting. For example, starting the meeting on time will add to the MQS but going over the meeting time will take away from the MQS.

Figure 23: Meeting Quality Score

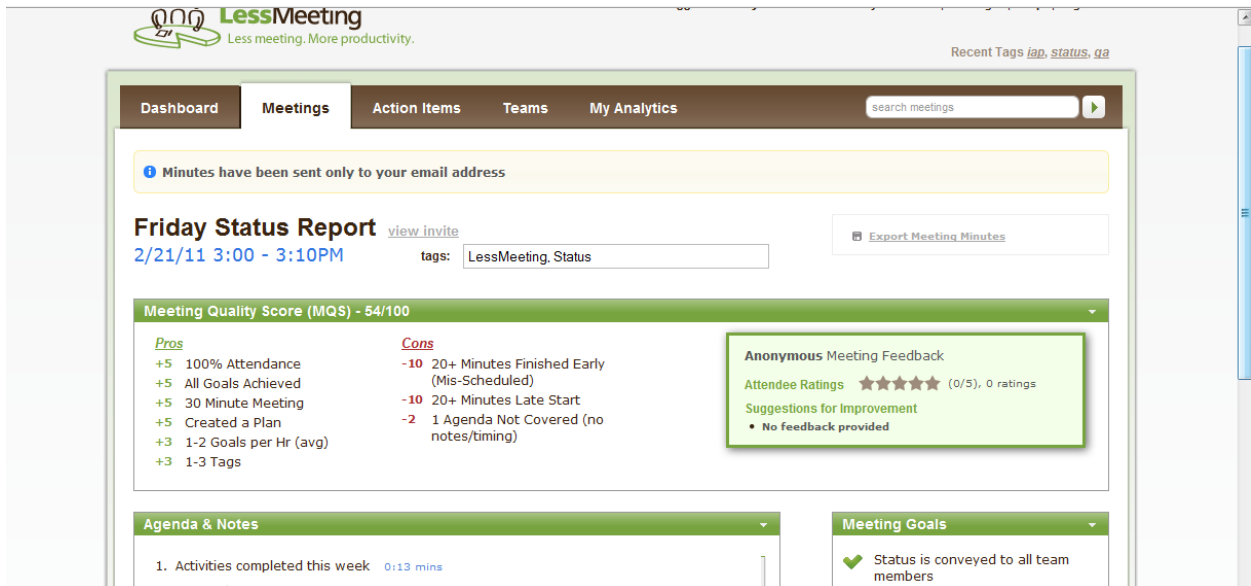## 5.3.   Exporting Meeting Notes

Once the meeting is closed an *Export Meeting Minutes* link appears at the top right corner of the window. The meeting minutes can be exported to PDF, Microsoft Word, or Wiki format to further distribute and/or post the notes you took.
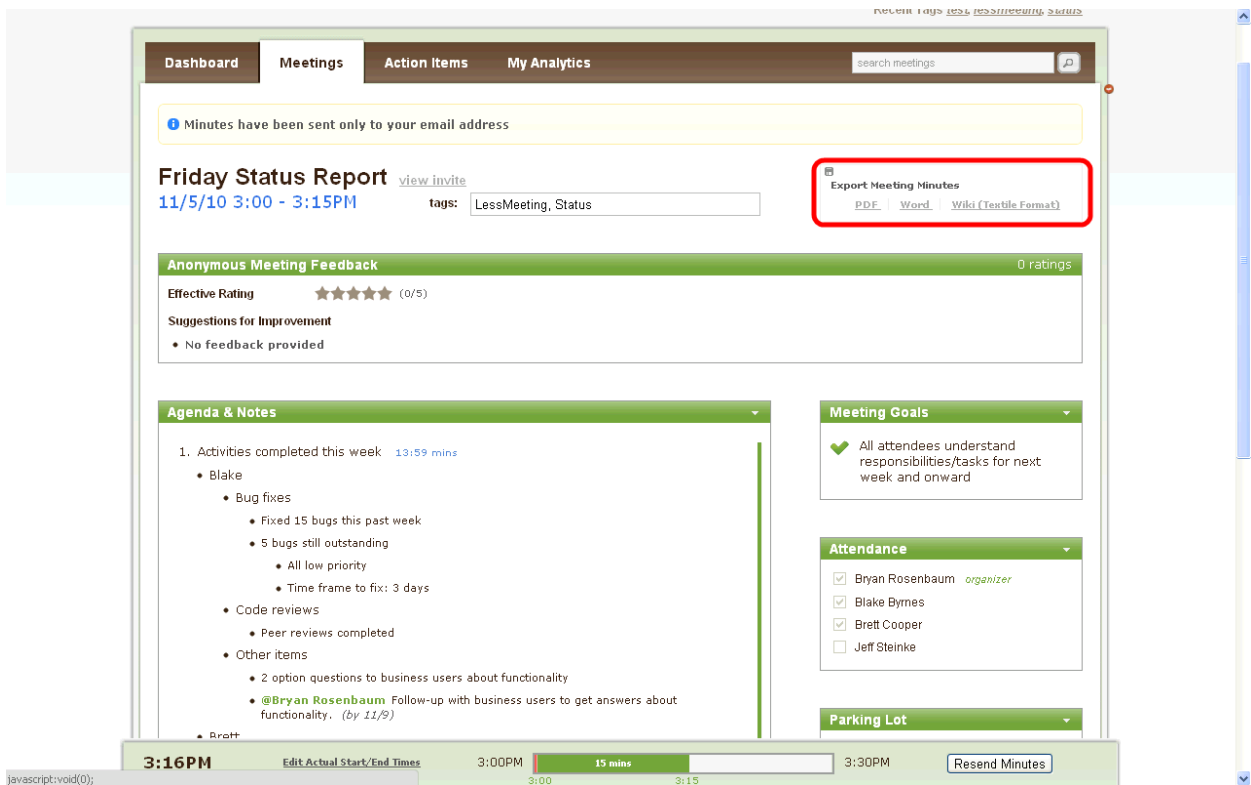
Figure 24: Export Meeting Minutes

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5.4.   Tracking Action Items

Action items created during your meetings appear on the Action Items page of the LessMeeting website. This page not only shows which action items are still active and when they are due, but it also shows action items that are completed and action items assigned to other people from meetings you have attended.

Figure 25: Action Items Tracking

In addition to the action items appearing on the LessMeeting website, the action items assigned to anyone registered with LessMeeting will synchronize down to their Outlook task. When the action item is completed it can be checked off within Outlook and it will automatically synchronize with the website.

Figure 26: Action Items in Outlook

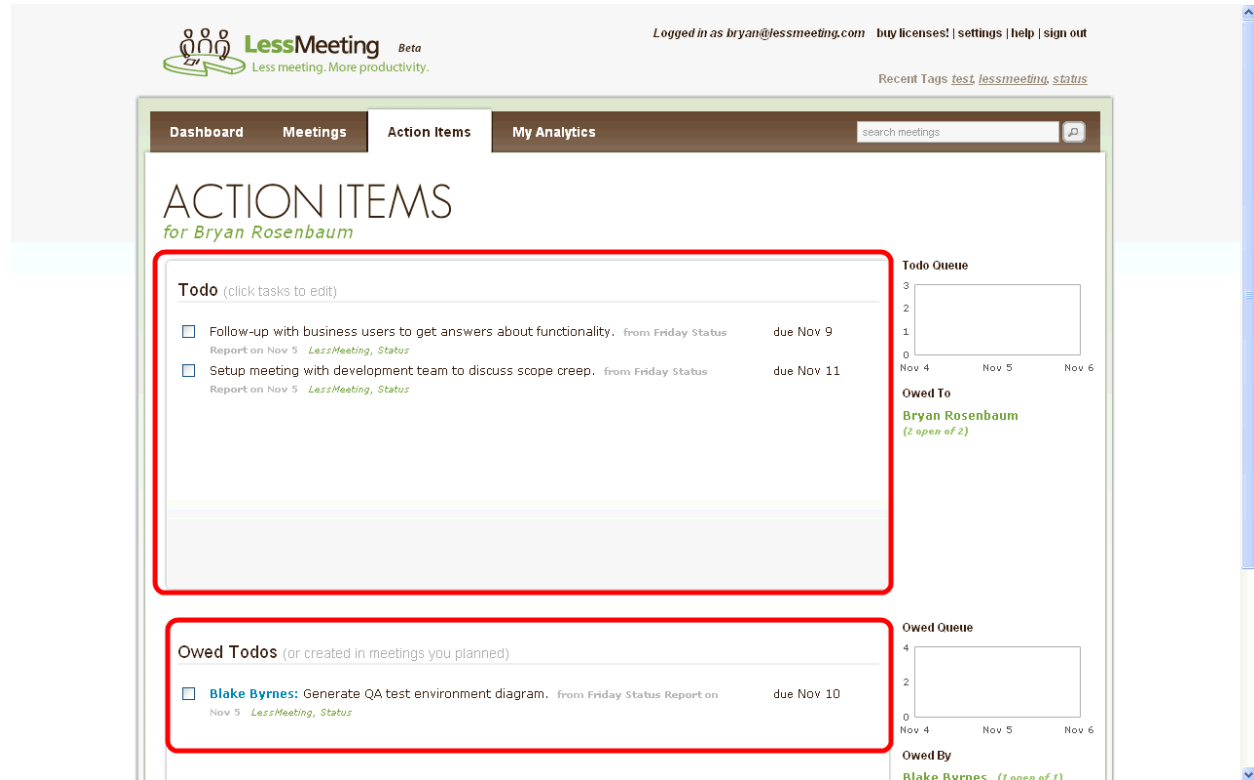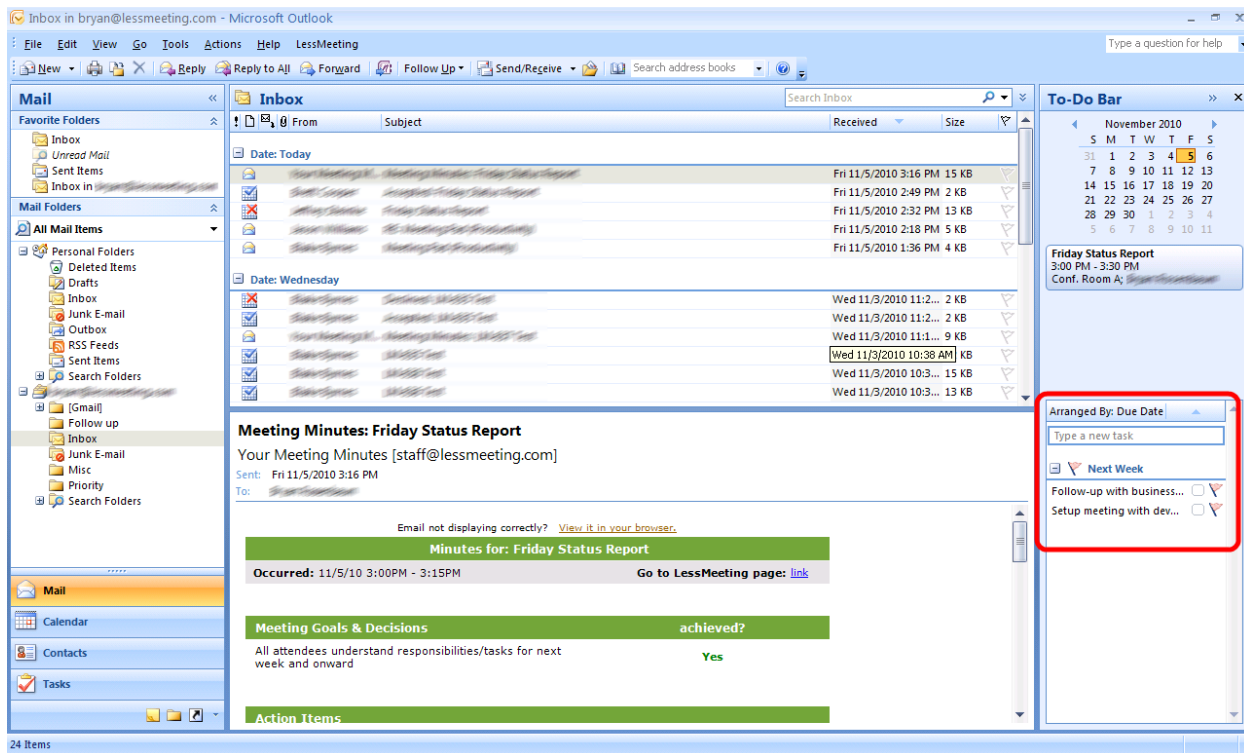The daily digest email will get sent out to each individual who is assigned an action item. A secure link is embedded in the email that allows people not registered with LessMeeting to mark their action items as completed.

5.5. Ratings & Comments

When multiple meeting participants are registered with LessMeeting each attendee can provide a rating and an anonymous comment for a meeting. This provides the meeting organizer with constructive feedback about the meeting so that he or she can have more effective meetings.

5.6. Daily Digest

The daily digest is sent to registered LessMeeting users daily if they have any option action items or if they have meetings the next day. It is also sent to non-registered people who were assigned action items.

6. FAQ

6.1. Outlook Client

Which versions of Microsoft Outlook does the plug-in support?

LessMeeting currently supports Outlook 2003, 2007, and 2010.

How does the plug-in get updates? Will I have to keep re-installing this thing?

The Outlook plug-in is built with a technology called Microsoft ClickOnce, and will <u>automatically</u> stay up to date with the latest version

Will LessMeeting work if I manage multiple email addresses in Microsoft Outlook?

Yes, but please ensure that the email account you use for LessMeeting is set as your default account in Outlook. Also, you will only be able to save LessMeeting records for meetings scheduled with the email you registered at LessMeeting.

Can I still use LessMeeting if I am not using the Outlook client (i.e. sending from Webmail)?

Yes, see section 3. Setting Up a Meeting without the Outlook Client for more information on how to do this.

If I make changes to the meeting goals, agenda items, or tags in Outlook, do I need to resend the meeting invitation to all of the participants?

If you make changes to the Goals, Agenda, or Tags in Outlook the changes will automatically be saved and synchronized with the LessMeeting website when you close the meeting. There is no need to resend the meeting invitation to all of the participants. You also have the option of making changes to the meeting on the LessMeeting website, which will synchronize with your Outlook meeting.

Is there a way to have meetings not show up in LessMeeting?

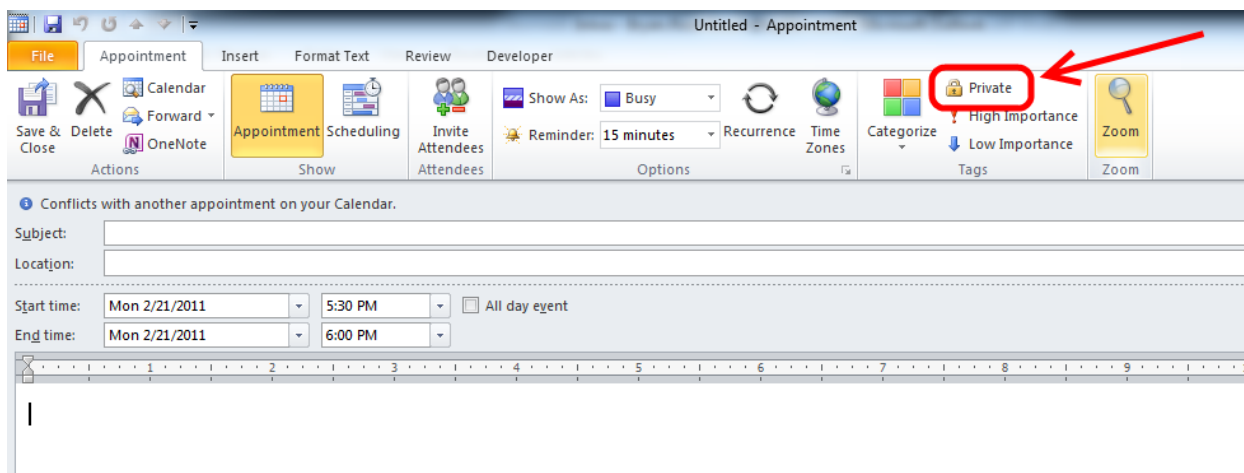Any calendar event marked Private in Outlook will not show up in LessMeeting.

Figure 27: Private Meeting

6.2. Action Items

How do I know when action items owed to me are completed?

Action items that are owed to you will show up in the daily digest. When they are completed there will be a section included in the next daily digest that shows the completed task. Additionally, you can see all of the outstanding and completed action items on the Action Items screen of the LessMeeting website.

6.3.   Daily Digest

How often is the daily digest email sent out?

The daily digest will be sent out each day to registered LessMeeting users if they have any open action items or if they have any meetings during the next day. See section 5.6 Daily Digest for more information.

Who is the daily digest sent to?

The daily digest is sent to registered LessMeeting users daily if they have any option action items or if they have meetings the next day. It is also sent to non-registered people who were assigned action items. See section 5.6 Daily Digest for more information.