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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, <u>http:///www.lessmeeting.com</u>. 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.

	234		iday Status Report - Meeting _ 🖉 🗙					
Cancel	Calendar Calendar Delete	Appointment Scheduling Meeting	👻 🌀 🛄 🥴 High Importance 🔍 🚱					
Invitation	is have not be	een sent for this meeting.						
Send								
		Fri 11/5/2010 ¥ 4:00 PM All day event Fri 11/5/2010 ¥ 4:30 PM ¥						
Status n	Status report meeting to review recent progress.							
∃ — LessM	leeting	Meeting Goals	Tags					
		type to add goal(s)	types of meetings, projects, clients, etc (ie, "status meeting, microsoft")					
		Meeting Agenda type to add	Print Agenda Preview Invite					
		* drag items to reorder, double click to edit	ດໍດິດິດໍ LessMeeting					

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.

	1234	Friday Status Report - Meeting -	. . .
Cancel	Calendar Calendar Calendar Calendar Calendar Calendar Calendar Calendar Calendar Calendar	Section 2 Sectio	0
Invitatio	ns have not be	een sent for this meeting.	
Send	To Subject: Location:	i <u>stf@lessmeeting.com;</u> blake@lessmeeting.com; brett@lessmeeting.com Friday Status Report Conf. Room A	~
	Start time:	Fri 11/5/2010 Image: All day event Fri 11/5/2010 Image: All day event	
Status	report meet	ting to review recent progress.	
- Lessi	Meeting ———	Meeting Goals All attendees understand responsibilities/tasks for next week and onward Meeting Agenda Type to add Type to add The service increased in the service increase	

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 rightclick 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.

	J 9 U	* *	÷			Friday St	tatus Report -	Veeting							х
	Meeting	Insert	Format Text												0
Cancel Invitatio	Calend Calend Delete n Actions	400	ointment Scheduling		ck Names	Show As: Busy		nce Time Categor Zones	rize	igh Importance ow Importance	ABC Spelling Proofing	Meeting Notes OneNote			
Invitati	ons have not	been sent	for this meeting.												
	To	ieff@le	ssmeeting.com; blake@l	essmeeting.com; brett@	plessmeeting.co	<u>om</u>									-
	Subject:	Friday	Status Report												=
Send	Location	Conf. R	oom A												*
	Start time	e: Fri 11/5	/2010	3:00 PM	🗌 🗌 All day e	vent									_
	End time	: Fri 11/5	/2010												
	Status report meeting to review recent progress.														
🖃 — Les:	Meeting														-
			Meeting Goals							Tags					Π
			type to add goal(s	5)					1	separate with	commas		1		
				understand responsibili	ties/tasks for ne	ext week and onward			Ĩ	types of meetin "status meetin	ngs, projects g, microsoft")	, clients, etc (ie,)	1		
		- (Meeting Agenda —												=
			1							Print.	Agenda P	review Invite			
			1 Activities com	pleted this week			0	15 mins							
			2 Activities to b	e completed next week				10 mins		000		sMeeting	~		
			3 Blocking issue	es			0-	5 mins				Sivieeun	y		
							30 minutes	Update End Time	J						-

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.

	🚽 🎝 Ü 🍐	Friday Status Report - Meeting _ 0	= x					
	Meeting	Insert Format Text						
Cancel Invitatio	Calendar Delete n 🕞 Forward Actions	Construction Const						
Invitati	ons have not b	een sent for this meeting.						
	То	ieff@lessmeeting.com; blake@lessmeeting.com; brett@lessmeeting.com	-					
	Subject:	Friday Status Report	_					
Send	Location:	Conf. Room A	~					
	Start time:	Fri 11/5/2010 V 3:00 PM V All day event						
	End time:	Fri 11/5/2010 V 3:30 PM V						
Status	Status report meeting to review recent progress.							
🗄 — Less	Meeting		-					
		Meeting Goals Tags						
		type to add goal(s) LessMeeting. Status						
		All attendees understand responsibilities/tasks for next week and onward types of meetings, projects, cliente, etc (ie, status meeting, microsoft)						
		Meeting Agenda	=					
		type to add Print Agenda Preview Invite						
		1 Activities completed this week 15 mins						
		2 Activities to be completed next week 10 mins						
		3 Blocking issues 5 mins						
		30 minutes Update End Time	•					

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.

🔁 Fri	day Status Report 11-05-2010.pdf - Adobe Reader			
<u>File</u>	dit <u>V</u> iew <u>D</u> ocument <u>T</u> ools <u>W</u> indow <u>H</u> elp			×
8	🔬 • 🌄 🛖 👆 1 / 1 💿 🖲 55.9% •	😝 🛃 Find		
ľ		Friday Status Report		
		11/5/2010 03:00 PM - 03:30 PM Organized By: Bryan	For improved facilitation, set meeting ground rules at the beginning of the meeting.	
		Meeting Intro	Attendee List	
		Status report meeting to review moent progress.	Intelligiessmeeting.com metal@lessmeeting.com Location Cont. Room A	
		Meeting Goal(s) Gud Advisored?	Parking Lot Keep In Mind, Tabled Rema, Table Offines, Schedule Officerent Meeting	
		Al attendes understand responsibilities/tasks for next		
		Agenda Items Discussion Notes Reg Points, Item, Updates, Reda, Inners, Water & Booking	Action Item/Decisions	
		1. A defuties completed bits week		
		2. Autoritades la be completed next event. 18 mains		
		E Biologia Interes S mitor		
sp				
Ø		Page 1 of 1	Meeting Template © 2010 LessMeeting.com	

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.

	- 1 04	• • • •		Friday St	atus Report - Meeting			_ = ×
	Meeting	Insert Format Text						۲
	Calendar Calendar Delete Calendar Delete Calendar Delete		Meeting Workspace Respondence	Names	es Recurrence Difference Cate Control Cate Control Cate	Low Importanc	Spelling Meeting	
Invitatio	ns have not b	een sent for this meeting.						
	To	jeff@lessmeeting.com; blake@le	essmeeting.com; brett@le	essmeeting.com				
Send	Subject:	Friday Status Report						
Senu	Location:	Conf. Room A						*
	Start time:	Fri 11/5/2010	3:00 PM	All day event				
	End time:	Fri 11/5/2010	3:30 PM 🗸					
		*!	1					B y ▲
		ting to review recent progr	ess.					Â
~#~#~	'#~#~#~							
Meeti	ng Goals							
- Al	lattende	es understand respon	sibilities/tasks f	or next week and onward	1			=
Agen	<u>da Items</u>							
		ompleted this week (
		o be completed next w sues (5 mins)	veek (10 mins)					
		eting, Status						•
<u> </u>								
😑 — LessN	deeting	Meeting Goals				T		^
			<u>`</u>			Tags	- (h.) -	-
		type to add goal(s				LessMeetin	etings, projects, clients, etc (ie,	
		All attendees u	understand responsibilitie	es/tasks for next week and onward		"status mee	ting, microsoft")	
		Meeting Agenda						
		type to add				Pri	nt Agenda Preview Invite	-

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.

Take Agenda Notes edit agenda 1. Activities completed this week 15 mins	Meeting Goals +
1. Activities completed this week 15 mins	
Add Notes (Hit TAB to indent, SHIFT+TAB to unindent)	Add Status is conveyed to all team members
2. Activities to be completed next week 10 mins Add Notes (Hit TAB to indent, SHIFT+TAB to unindent)	Attendance Bryan Rosenbaum organizer
+ KEY POINT + (D:) DECISION + (@) ACTION ITEM	attendee email Add
3. Blocking issues 5 mins	Documents & Images
Add Notes (Hit TAB to indent, SHIFT+TAB to unindent)	Upload file(s) - Drag file(s) to upload PridavStatusReport.docx 12.8KB

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.

Less meeting. More productivity.		Recent Tags <u>Im test, status, tag 1</u>
Dashboard Meetings Action Items	Teams My Analytics	search meetings
NEXT MEETING in 39 mins	Daily Use of Meeting Hrs 8 hrs	
"Tuesday Status Meeting" MY TEAMS COMBINED TEAM MEETING HOURS NEW! Get Started with LessMeeting Teams Today!	Jan 22 Feb 1	Feb 11 Today Mar 3 Meeting Hrs w/Notes Meeting Score (avg/100)
MY TEAMS Common Team Meeting Hours NEW! Get Started with LessMeeting Teams		,

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.

Subject: Sample Meeting			Tags:		
Location:			Tag 1, Tag 2		
Conf Room A					
ttendee Emails:					
attendee1@company	y.com, attendee2@company.com				
	Start: 04:00 PM use ↑ / ↓ keys to adjust	06:00 AM	ange the start time 12:00 PM 06:00 PM	Ends: 04:30 PM from agenda length	
Date: 02/21/2011 Meeting Goal(s):		06:00 AM			
	use ↑ / ↓ keys to adjust	06:00 AM Ig? (add one goal at a time)			

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 <u>add@invite.lessmeeting.com</u> 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) ...

Friday Statu	is Report	
10/31/2010	2:00pm to 3:00pm 10/31/2010 All day Repeat	
Event details	Find a time	
Where	Conf Room A	Add guests
Calendar	blake@lessmeeting.com	Enter email addresses
Description	Goals: 1) All attendees understand responsibilities/tasks for next week and onward	Add Added
	Agenda: 1) Activities Completed This Week (15 mins) 2) Activities to be completed next week (30 mins) 3) Blocking issues (15 mins)	Added Blake Byrnes × barbara@lessmeeting.com* × joe@lessmeeting.com* ×
	<i>_</i> _	* Calendar cannot be shown. Why?

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.

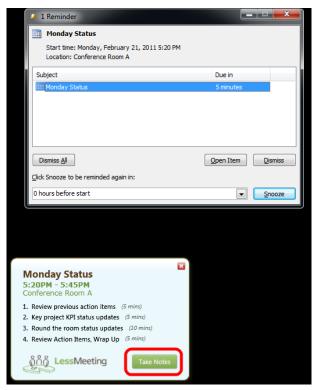


Figure 11: Meeting Notification

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

🔲 🛃 🖻	រប់ 🔺 👻	▼		Proj Daily Standup - Mee	ting Occurrence	1 mar		- 0 - X
File	Meeting Oc	currence Insert Format Text	Review Developer					۵ 🕜
Cancel Meeting	,	Appointment Scheduling Tracking	Contact Attendees - Address Check Book Names Attendees	Response 🙀 Reminder:	Busy None Options	me ines Methodd Methodd Methodd Methodd Methodd Methodd Methodd Methodd Methodd Methodd Methoddd Methodd Methodd Methoddd Methoddd Methoddd M	Zoom	
		, Tuesday, Wednesday, Thursday, and , 0 tentatively accepted, 0 declined.	d Friday effective 1/10/2011 until	4/29/2011 from 2:15 PM to 2	:30 PM			
	From •	bryan@lessmeeting.com						
Send	То	bob@lessmeeting.com, joe@lessmee	ting.com					
Update								
	Location:	Conf Room A OR Dial-in: 1-800-123	3-4567					
	Start time:	Mon 2/21/2011 - 2	:15 PM 👻 🗌 All day ev	vant				
	End time:		:30 PM -	vent				
7				E		8 • • • 1 • • • 9 • • • 1 • • • 1	0	
Please	be prepared	to discuss your 1. Achievemen						
Meeti	ng Goals							•
😑 — LessN	Aeeting							
	liceting	Use an Agenda Template	Tags					П
		None	Stat	hus				
		Daily Status Meeting Use this template for a daily			sugge	estions: Offshore QA Bluefletch Reporting	Requirements	=
		 Standup Meeting / Scrum Use this template for agile for meetings 	ast pace daily update Meeting	ing Goals				
			show all y	e to add goal(s)			•	
				Communicate daily status, pro	gress, and plans.			
		ດໍດິດິດໍ Less	Meeting	Identify Obstacles so that the I	eam can remove them.			
		Got	o Meeting Space	ing Agenda				
			type	e to add				
R	Bryan Rosenba	um						2 .

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.

Dashboard Meetings Action Items	My Analytics search meetings	
NEXT MEETING in 32 mins "Friday Status Report"	Hours In Meetinos vs. Errectiveness I Hours (hrs/8)	Effective (avg/5)
ACTION ITEMS	Oct 26 Oct 31 Today	Nov 10
Nothing Right Now		
ACTION ITEMS OWED TO YOU	ALL MEETINGS UPCOMING RECENT	l ★ effective
Nothing Right Now	UPCOMING lessmeeting, status	
	Friday Status Report in 32 mins	1 Goal
	RECENT MEETINGS test, lessmeetina, status meetina, status	last 7 days
	XYZ Project Status Fri 1PM your meeting	✓ 0/0
	LM-638 Test Wed 11AM your meeting	♥ 0/0
	LM-637 Test Wed 11AM your meeting	♥ 0/0
	Monday Status Report Mon 5PM your meeting	∀ 0/0

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.

Dashboard Meetings Action items My Analytics	search meetings
Friday Status Report View Invite 11/5/10 3:00 - 3:30PM tags: LessMeeting, Status	🛱 Print Agenda
Take Agenda Notes 1. Activities complet Meeting Invite	edit agenda Meeting Goals - Add
Add Notes (Hit) Add Notes (Hit) Key Point Key Point Add Notes (Hit) Add Notes (Hit) Key Point Add Notes (Hit) Key Point Key Point Add Notes (Hit) Key Point Key Poin	erstand .sks for next week
2. Activities to be co Add Notes (Hit T	um O organizer
+ Key Point + (D:) Decision + (@) Action Item 10 min	
 Blocking issues 5 mins Add Notes (Hit TAB to indent, SHIFT+TAB to unindent) Key Point + (D:) Decision + (@) Action Item 5 mins 	attendee email Add

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.

Dashboard Meetings Action Items My Analytics	search meetings	2
Friday Status Report view invite L1/5/10 3:00 - 3:30PM tags: LessMeeting, Status	Print Agenda	
Take Agenda Notes	<u>edit agenda</u> Meeting Goals	•
 Activities completed this week 15 mins Add Notes (Hit TAB to indent, SHIFT+TAB to unindent) Key Point + (D:) Decision + (@) Action Item 15 mins 	All attendees understand responsibilities/tasks for next week and onward	
2. Activities to be completed next week 10 mins Add Notes (Hit TAB to indent, SHIFT+TAB to unindent)	Attendance Bryan Rosenbaum © organizer Blake Byrnes Blake Byrnes Blake Cooper	-
+ Key Point + (D) Decision + (E) Action Item 10 mins 3. Blocking issues 5 mins	attendee email	d
+ Key Point + (D:) Decision + (@) Action Item 5 mins	*	

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.

Dashboard Meetings Action Items My Analytics	search meetings
Tiday Status Report view invite 1/5/10 3:00 - 3:30PM tags: LessMeeting, Status	Print Agenda
Take Agenda Notes	edit agenda Meeting Goals add goals 👻
1. Activities completed this week 15 mins Add Notes (Hit TAB to indent, SHIFT+TAB to unindent)	All attendees understand responsibilities/tasks for next week and onward
+ Key Point + (D:) Decision + (@) Action Item	Attendance
2. Activities to be completed next week 10 mins	 ✓ Bryan Rosenbaum [©] organizer ✓ Blake Byrnes ✓ Brett Cooper [©]
Add Notes (Hit TAB to indent, SHIFT+TAB to unindent) Key Point + (D:) Decision + (@) Action Item	LO mins left Add
3. Blocking issues 5 mins	Parking Lot 👻
Add Notes (Hit TAB to indent, SHIFT+TAB to unindent) Key Point + (D:) Decision + (@) Action Item	i mins left

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 ^o icon next to their name while people who have declined will have an ^o 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.

Take Agenda Notes	edit agenda Meeting G	oals <u>add qoals</u> 👻
1. Activities completed this week 15 mins		es understand ties/tasks for next week
• Blake	and onward	
Bug fixes		
 Fixed 15 bugs this past week 	Attendanc	P v
 5 bugs still outstanding 		
All low priority		osenbaum © organizer
Time frame to fix: 3 days Code reviews	Blake By	
Code reviews Click to edit, Drag to reorder Peer reviews completed	Jeff Steir	·
Other items		
 2 option questions to business users about functionality 	attendee en	Add
+ Key Point + (D:) Decision + (@) Action Item	Parking Lo	t ČÁdd
2. Activities to be completed next week 10 mins	•	
• Blake		
 Lead code reviews 		
 Fix remaining bugs 		
Add Notes (Hit TAB to indent, SHIFT+TAB to unindent)	+	

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 $\stackrel{(\leftarrow)}{\rightarrow}$ 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 $\textcircled{\bullet}$ 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.

Dashboard Meetings Action Items My Analytics	search meetings
riday Status Report view invite 1/5/10 3:00 - now tags:	Print Agenda
Take Agenda Notes <u>edit aq</u> r	nda Meeting Goals add goals 👻
 1. Activities completed this week 15 mins 9. Blake 9. Bug fittes 9. Fixed 15 bugs this past week 9. Su bug still outstanding 9. Bill low priority 9. Ber reviews completed 9. Other retimes 9. Other	All attendees understand responsibilities/tasks for next week and onward Attendance

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.

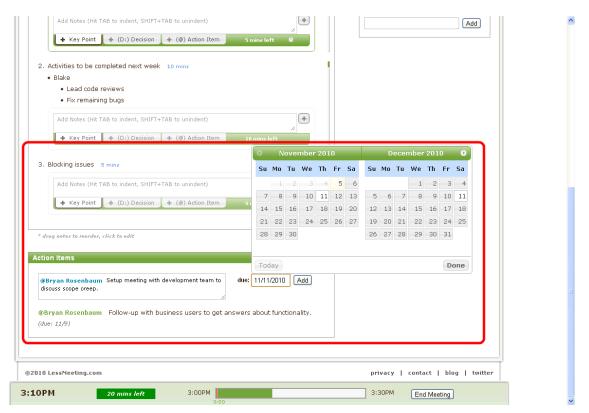


Figure 19: Action Items at Bottom of Page

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.

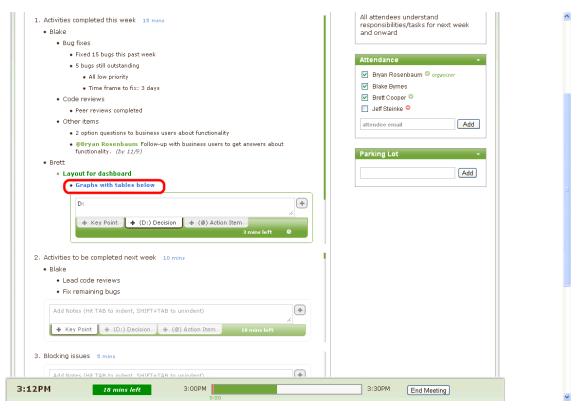


Figure 20: Decisions

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 $\widehat{\square}$ icon.

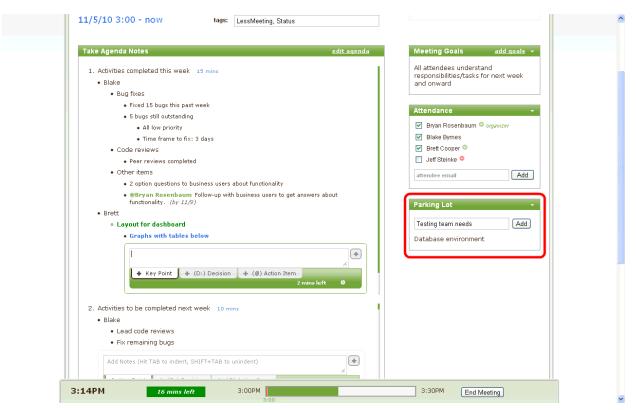


Figure 21: Parking Lot

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.

Friday Status Repo	tags: LessMeeting, Status	Print Agenda
Take Agenda Notes 1. Activities completed this we Blake Bug fixes Fixed 15 bugs this g S bugs still outstant All low priority Time frame to Code reviews Peer reviews comp Other items 2 option questions: @Bryan Rosenba functionality. (by 2) Brett Cugut for dashboard	Close Out The Meeting Did you achieve the goals for this meeting? -All attendees understand responsibilities/tasks for next wee Ves or why not? Add a Message © Send Minutes to: all attendees ccemails Close & Send Minutes or do this laten preview minutes email	iance ▼ an Rosenbaum © <i>organizer</i> ke Byrnes tt Cooper © fSteinke ●
Graphs with table Add Notes (Hit TA + Key Point	s below to indent, SHIFT+TAB to unindent) (D:) Decision + (@) Action Item 2 mins left	Testing team needs Add Database environment

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.

Dashboard Meetings	Action Items Teams My Analytics	search meetings
Minutes have been sent only	to your email address	
	tags: LessMeeting, Status	Export Meeting Minutes
Meeting Quality Score (MQS) - Pros +5 100% Attendance +5 All Goals Achieved +5 30 Minute Meeting +5 Created a Plan	<u>Cons</u> -10 20+ Minutes Finished Early (Mis-Scheduled) -10 20+ Minutes Late Start -2 1 Agenda Not Covered (no notes/timing)	Anonymous Meeting Feedback Attendee Ratings (0/5), 0 ratings Suggestions for Improvement • No feedback provided

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.

Dashboard Meetings Action Items My Analytics	search meetings
Minutes have been sent only to your email address	
Friday Status Report view invite 11/5/10 3:00 - 3:15PM tags: LessMeeting, Status	Export Neeting Minutes PDF Word Wiki (Textile Format)
Anonymous Meeting Feedback	0 ratings
Effective Rating (0/5)	
Suggestions for Improvement	
No feedback provided	
Agenda & Notes 1. Activities completed this week 13:59 mins Blake Blake Bug fixes	 ✓ Meeting Goals ✓ ✓ All attendees understand responsibilities/tasks for next week and onward
 Activities completed this week 13:59 mins Blake Bug fixes Fixed 15 bugs this past week 5 bugs still outstanding All low priority Time frame to fix: 3 days Code reviews 	All attendees understand responsibilities/tasks for next
 Activities completed this week 13:59 mins Blake Bug fixes Fixed 15 bugs this past week 5 bugs still outstanding All low priority Time frame to fix: 3 days Code reviews Peer reviews completed Other items 	All attendees understand responsibilities/tasks for next week and onward Attendance Bryan Rosenbaum orgen/zer Blake Byrnes
 Activities completed this week 13:59 mins Blake Bug fixes Fixed 15 bugs this past week 5 bugs still outstanding All low priority Time frame to fix: 3 days Code reviews Peer reviews completed Other items 2 option questions to business users about functionality 	All attendees understand responsibilities/tasks for next week and onward Attendance Bryan Rosenbaum organizer Blake Brynes Brett Cooper
 Activities completed this week 13:59 mins Blake Bug fixes Fixed 15 bugs this past week 5 bugs still outstanding All low priority Time frame to fix: 3 days Code reviews Peer reviews completed Other items 	All attendees understand responsibilities/tasks for next week and onward Attendance Bryan Rosenbaum organizer Blake Brynes Brett Cooper

Figure 24: Export Meeting Minutes

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.

Report on Nov 5 4	aum edit) usiness users to get answers a arc/heeking, Status ith development team to discu	about functionality. from Friday Status SS SCOPE CREEP. from Friday Status	due Nav 9 due Nav 11	Todo Queue 3 2 1 Nov 4 Nov 5 Nov 6 Owed To
				Bryan Rosenbaum (2 open of 2)

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.

Inbox in bryan@lessmeetin	, ,					
<u>File Edit View Go T</u> oo						Type a question for help
🔂 <u>N</u> ew 👻 🦛 🏰 丫 🙈 <u>E</u>	eply 🆓 Reply to All 🖂	For <u>w</u> ard │ 🐖 Follow <u>U</u> p ▼ 📑 Send/Re <u>c</u> eive 👻	🔌 🔟 Search address books 📼 🙆 👳			
Mail	« 🔄 Inbox		Sear	ch Inbox	۶ - ۵	To-Do Bar »
Favorite Folders		m Subject		Received V Size	7 🔺	November 2010
🖂 Inbox 🔟 Unread Mail	🖃 Date: Today					SMTWTFS
Sent Items	-	Netting W. Oletting Master Fride Statustics		Fri 11/5/2010 3:16 PM 15 KB		31 1 2 3 4 5 6 7 8 9 10 11 12 13
Inbox in	00100			Fri 11/5/2010 2:49 PM 2 KB	, <u>(</u>	14 15 16 17 18 19 20
Mail Folders					Y NY	21 22 23 24 25 26 27
All Mail Items				Fri 11/5/2010 2:32 PM 13 K		28 29 30 1 2 3 4
		en Williams - 28 Weeking Part Rockettindy		Fri 11/5/2010 2:18 PM 5 KB	Y L	5 6 7 8 9 10 11
🗉 🧐 Personal Folders		iersiemen: inieeningsfeer(Freeduntintly)		Fri 11/5/2010 1:36 PM 4 KB	Y	Friday Status Report
Deleted Items Drafts	🖃 Date: Wedn	esday				3:00 PM - 3:30 PM Conf. Room A;
inbox	×	krisener (Sesines) (Messines)		Wed 11/3/2010 11:2 2 KB	V	
🧓 Junk E-mail		instance Assepties UNASS feet		Wed 11/3/2010 11:2 2 KB	Ÿ	
🔄 Outbox		rukieting kl., dileting kinale: (10.637 fest		Wed 11/3/2010 11:1 9 KB	Ý	
Sent Items	X	instance (Matter		Wed 11/3/2010 10:38 AM KE	V	
Search Folders		iesenes (10.835/est		Wed 11/3/2010 10:3 15 KE		
		interne (MARGard		Wed 11/3/2010 10:3 13 KE	V _	
🗉 🚞 [Gmail]		a appendix and a set of the				Arranged By: Due Date
🚞 Follow up	Meeting N	Minutes: Friday Status Report				
inbox	_					Type a new task
🧑 Junk E-mail		ing Minutes [staff@lessmeeting.com]				🖃 🍸 Next Week
Misc Priority	Sent: Fri 11/5					· · · · · · · · · · · · · · · · · · ·
Endity	To:	at 1 and				Follow-up with business 🗆 🍸
					-	Setup meeting with dev 🗌 🚩
		Email not displaying correctly? View	/ it in your browser.	_		
		Minutes for: Friday Sta	tus Report		=	
	Occurred	: 11/5/10 3:00PM - 3:15PM	Go to LessMeeting page: link			
🛁 Mail						
Calendar	Mosting	Goals & Decisions	achieved?			
Contacts		ees understand responsibilities/tasks for next				
	week and		Yes			
🟹 Tasks						
🔍 🗀	Action It	tems			-	
Items						

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)?

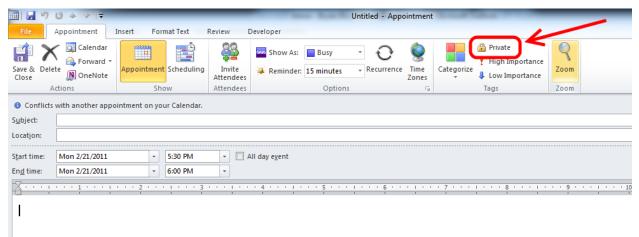
Yes, see section 3. Setting Up a Meeting without the Outlook Client for more information on how to do this.

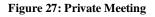
If I make changes to the meeting goals, agenda items, or tags in Outlook, do I need to resend the meeting invitation to all of the participants?

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.





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.