Automated Scheduling: Pre-flight Questions

Answer these questions before meeting with our team. That helps us design the best automated scheduling approach for your event. Questions? Reach out to support@meetmax.com

Questions about participants

- What user roles are you using in your event? Which role(s) represent the Buyer? Who's the Seller?

- Which user roles request meetings? (These are Source roles)

- Which roles receive the requests? (These are Target roles)

- Does your event have Buyers or Sellers arranged into any groups? Do any of those groups have special meeting requirements?

- Are there any priority groups or individuals, whose meetings should be scheduled first?

- Do you anticipate that any of your Targets will be in higher demand for meetings?

- Are there any Targets who won't be taking meetings at all?

Questions about meeting requests

- Have your participants added rankings to their meeting requests?

- Is your event using one-sided requests, meaning Buyers can only request meetings with Sellers?

- Is your event using two-sided requests, where Buyers and Sellers can both request meetings?

- If you're using two-sided requests, do you want to prioritize mutual requests?

- Does your event have an approval step for meeting requests? If so, do you want to schedule meetings only for approved requests?

Questions about meetings

- What are the meeting types your event is using? Are they all 1x1? Do you use group meetings?

- Do you want to limit the number of meetings on specific days of your event?

- Do you want to consolidate meetings to specific days, or spread them over multiple days?

- Do you want to limit the number of meetings each participant can have? (Or, do you want to limit meetings for certain groups of participants?)

Questions about meetings (cont'd)

- Are any participants using multiple diaries, so they can have overlapping meetings?

- Do you want colleagues from the same company to be placed into the same meetings? Or can they meet individually with the same Seller?

- Do you want unaffiliated participants to be scheduled into the same group meetings?

Prerequisites to verify

- Has everyone in the Seller role set their meeting availability? ([Here's how to check](#), so you can follow up as needed.)

- Has everyone in the Buyer role submitted meeting requests? ([Here's how to check](#), so you can follow up as needed.)

- Has our Support team given you access to a sandbox instance for testing automation passes?

- Have you already made presentations and activities available for sign-ups? (That affects meeting availability.) Have you allowed enough time for people to sign up?

- Do you have enough available time slots for all meeting requests? ([Here's how to check](#).)