| | | |
|---|---|---|
| Expected Duration: 180 Seconds | SME: | Content Dev: Laura L. |
| Talent/VO: Laura | MMD: | |
| Audience: | Context: | |
| Summary:<br><br>Learn how Ninety supports and facilitates meetings. | | |

Metadata Tags:

| | | | | |
|---|---|---|---|---|
| Tool: Meetings | BOS: 90OS | Review Meetings Tool and functionality | Identify various meeting intervals | Explore Custom Meetings |

Objectives:

- Outline the steps to use the Meetings tool in Ninety.
- Identify meeting intervals.
- Explore the value add of creating custom meetings.

| Section# | Multimedia/LD Cues | Narration | On Screen Text |
|---|---|---|---|
| 1.0 | Title Card | | Getting Started with Meetings |
| 1.1 | | Establishing a consistent meeting cadence is essential for helping your team focus, align, and thrive.<br><br>Ninety's Meetings tool allows you to improve relationships; share progress on Rocks and To-Dos; review Key Performance Indicators, or KPIs; and Raise, Discuss, and Resolve issues. | |
| 1.2 | [1] Show process for hosting a meeting, reveal on screen with narration.<br><br>[2] Jump to an active meeting and click *Join Meeting* | [1] To start a meeting:<br>• Navigate to the Meetings tool.<br>• Use the filters bar to select which team the meeting will be held for.<br>• Click *Start a Meeting.*<br>• Then, select the appropriate meeting type to start the meeting.<br><br>[2] The process for joining an active meeting is similar, but instead, click *Join Meeting* on | |

| | | | |
|---|---|---|---|
| | | the Meetings page. When you join an active meeting, you will be able to see which agenda topic the team is currently on from the Meetings page. | |
| 1.3 | [1] Show each tool in action.<br><br>[2] Show past meetings section with Notes section visible. | To facilitate a successful meeting, use these Ninety tools:<br>• The player controls at the top allow you to pause the meeting or skip between sections.<br>• Section headers let you jump directly to that section.<br>• *View Tool* allows you to open any of Ninety's tools in the meeting window. These tool views are fully interactive.<br>• *Show Notes* opens a note-taking section that persists through a meeting and is saved in the *Past Meetings* section of the Meetings tool.<br>• *Finish* ends the meeting. | |
| 1.4 | View previous meeting and open meeting report. | To view the previous meeting reports from the Meetings tool, click the *Past Meetings* tab at the top, then filter to the team and meeting type you want to view. Click the meeting to open a side panel containing the meeting | |

| | | | |
|---|---|---|---|
| | | report. These reports provide valuable insights into what was covered and the outcomes created. | |
| 1.5 | Update existing meeting agendas | There are three default meeting types available in the Meetings tool. They are Weekly Meeting, Quarterly Meeting, and Annual Meeting.<br><br>These meeting types can be customized, or users can create a brand-new custom meeting agenda.<br><br>[1] To customize an existing meeting agenda, click on the *Agendas* tab.<br><br>[2] From here, filter to the correct team.<br><br>[3] Then, select the agenda you would like to update from the list.<br><br>[4] From here, you can edit the duration of each section, change section names, and add or remove sections. | |

| | | | |
|---|---|---|---|
| | | [5] You can add existing tool sections as agenda items by clicking *Add Tool Section*. This will bring up a list of tools available in Ninety that are currently not on your agenda. Click the tool section to add to your agenda.<br><br>[6] To create a custom section, click *Add Custom Section*. Then, enter the name, duration, details, and URL if applicable.<br><br>[7] When done, click *Save Changes*. | |
| 1.6 | Create a custom meeting. | [1] To create a custom meeting agenda, click the *Agendas* tab at the top of the page.<br><br>[2]Filter to the team you are creating the meeting for, then click *Create Agenda* at the bottom of the page.<br><br>[3] From here, enter the custom meeting name, and add your agenda topics using the same steps as when you edit an existing agenda. | |

| | | | |
|---|---|---|---|
| | | As you're editing, be mindful of the expected total duration of the agenda in the bottom right to ensure you are within the meeting time.<br><br>When you're done editing, click Create Agenda.<br><br>The new agenda will be available on the agenda list when starting a meeting for the team you created the agenda for. | |
| 1.7 | Schedule a meeting | To schedule a meeting in Ninety, click the upcoming tab on the top of the Meetings page. From here, click *Schedule a Meeting*.<br><br>Select an agenda and enter the meeting details, including the date, time, whether it is a repeating cadence, and the presenter.<br><br>When finished, click *Save*. The meeting will populate in the *Upcoming Meetings* section at the bottom of the page. | |

| | | | |
|---|---|---|---|
| | | This meeting will not be integrated with calendar invites, so be sure to invite the meeting participants using additional calendars. | |
| 1.8 | | Now, it's your turn to start creating, customizing, scheduling, and running efficient meetings with Ninety.<br><br>For more support, visit our website or reach out to our team using the chat icon in the bottom right of any Ninety screen. | |