

Box for Meeting Best Practices

Use Box to gather content, review information and collaborate in meetings. Using Box for meetings, executives and staff can maintain visibility into work items, gather feedback and seamlessly share information with colleagues involved in critical decision making processes.

At a high level, effective meetings require communication, preparation, and facilitation. While Box cannot replace simple things like setting detailed agendas and avoiding redundant items, it offers a powerful platform for sharing and collaboration for all of your meetings.

Using Box is ideal for staff who:

- Have regularly scheduled meetings
- Collaborate and hold meetings with staff in other locations
- Want to know how and when key decisions were made in an organization
- Use smart phones, tablets, laptops, and mobile devices
- Are tired of emailing attachments minutes before a meeting deadline

Benefits of using Box to share and collaborate for meetings include:

- Fast, easy access to meeting content, materials, and notes
- Dramatically improved meeting productivity
- Complete mobile workflow
- Better security than paper documents

You New Work Process – create folders, content, and agendas

1. Create a folder named “Meetings” at the root level in Box. Create subfolders for the different types of meetings in your department. Since most meetings will be internal, you can set the folder access permissions to be available to staff in your department only. You can also use “Tags” to organize your files. See Tags Best Practices for more information.
2. Create a folder for the meeting. From a file and folder design perspective, you can either create subfolders for content in a meeting or store items flat and by date.
3. Before a meeting, use Box to send agendas to participants. You can track who opens agendas and whether they review content using shared links. As a best practice, setting an agenda and sticking to it help with productivity and time management. You can set different security permissions for attendees and specify rights within a particular meeting folder.

Discuss, Comment, and Share

1. Once you set your agenda for a meeting, use discussions to see how decision are being made, voice our opinions, determine what issues need to be discussed, and see who is influential about issues. Go to the “Discussion” tab, add a topic, and insert a comment. As a best practice, you can create discussions for each folder or topic.

2. As content is uploaded to Box, you can comment on information as you did in discussions. Simply type @ and mention a person you are collaborating with. If you are not already collaborating within someone on content or a folder, invite them so you can start sharing information.
3. If you need someone to review an important file before a deadline, attach a task to the file in Box and assign it to a person. Box will notify them that there is work to do. You can assign tasks to multiple people at once.
4. If you are not sure what you need to do next to prepare for your meeting, use the “Pending Items Manager” in the Box menu to review the tasks assigned to you, see which tasks you created, tasks assigned to others, and track deadlines associated with content. You can use this screen to see which staff has reviewed content and which still need to complete tasks.

Collaborate in Real-Time During a Meeting

1. Present and share content using [Fresnostate.box.com](https://fresnostate.box.com) or Box Mobile. You can use Box to preview PPT slides, PDFs, Word documents, spreadsheets, videos, audio, and images. You can present information directly from Box without having to worry about native applications. You can also present the same content from your iPad or tablet.
2. In the Box web interface, take notes in web doc or Google doc. This tracks your notes along with other content in the meeting, giving you a searchable record you can easily share with others after the fact.

Take Notes in the Notability App on Your iPad

Notability is a versatile app that allows you to capture ideas and notes with handwriting, text, and drawing tools to fully document a meeting.

- Open and annotate PDFs and save them back to Box
- Use bullet points, numbered lists, and spellcheck to take accurate and organized notes for sharing
- Click on the record button to record voice notes, or the entire meeting
- Import existing notes and documents from your Box account into Notability for editing

Publish Content

1. Before the meeting, make sure attendees know they won't be getting paper slide decks and binders of information. Instead, they can access the latest copy of all documents in Box.
2. After the meeting, place all notes, scanned documents, photos, videos, and final slides in the designated meeting folder. With a single, secure, point of access, you can set content expiration and password protection for secure sharing. You can also embed individual files or folders into your website or blog and share content on social networks like Twitter.
3. Move or copy finalized content to other folders and share them with others. Once a meeting is complete, you might need to move content to different locations in Box. You

can either use the Move/Copy dialogue or create a shortcut to the file by creating a new Web Bookmark in Box.

Note that viewing content on mobile devices requires individuals to have the “download” permission level, so plan your folder security accordingly.

To learn more visit <http://success.box.com/best-practices/box-for-meetings/>