*"In three easy steps, I have ensured the right people know what is expected of them, created a professional-looking agenda and ensured all pre-meeting tasks have been distributed. I can preview the professional-looking pdf before sending."*

*- Lisa Hill*

## Case Study - Prevent the pebbles that stop the wheels of compliance with MeetingBooster.

**Lisa Hill, ISO 9001: Lead Auditor**

Wood Products Associated Industries's goal is to make FSC® Certification as easy to implement and maintain for small woodworkers as it is for large companies.

**Company**

Wood Products Associated Industries

**Industry**

Manufacturing

In the past it has been difficult and time-consuming to collect necessary pre-audit evidence and collaborate effectively with team members. My pre-meeting emails may go unanswered, leaving myself and others unprepared for the meeting.

In MeetingBooster I can easily create an agenda, clearly defining the details, agendas and tasks of the meeting. Prior to the meeting, I can assign tasks to attendees. By creating meetings with co-collaborators, the department being audited can attach any relevant documentation prior to the meeting, saving time and frustration on audit day. Once the agenda is complete, the MeetingBooster system will send a PDF agenda to all attendees with the relevant documents imbedded into the correct section of the meeting agenda.
I can create an agenda from a template, saving time on subsequent audits and to ensure all topics that need to be covered, are covered. This is an excellent tool for my department compliance personnel, as we can all use the same template, ensuring all documents conform to our policies.

Agenda items are easy to add and sub agenda items can be added, moved and edited quickly and efficiently. Since I have been using MeetingBooster, I find clients are better prepared for audits because the agenda has been clearly defined and all necessary documents are in one place. MeetingBooster sets expectations and clearly defines audit requests that otherwise get lost in piles of emails. There is no telling how long I have spent looking through emails, or waiting on emails for relevant documentation!

Once the agenda is created, I can embed documents from my computer or weblink. I am not limited by the number of attachments to a meeting. I can assign pre-meeting tasks, requesting specific information, a due date and a priority level for these tasks.

In three easy steps, I have ensured the right people know what is expected of them, created a professional-looking agenda and ensured all pre-meeting tasks have been distributed. I can preview the professional-looking pdf before sending.

The system saves time, improves accountability and ensures all audit documentation is safely stored in one place.

During the audit, I launch the meeting directly through Outlook, or launch from the MeetingBooster interface. First, check the roll call, ensuring everyone that needs to be there, is there. In the past, training and attendee records were manually recorded, leaving room for error on topics covered or attendance. Thus, the roll call is particularly helpful when scheduling trainings that can be done remotely. I can manually add anyone and verify if others have completed the pre-audit tasks before starting the meeting.

As we move through the meeting, I can add agenda items, toggling back and forth between items as necessary, adding notes and comments in each section. I can add discussion dialog, assign tasks and verify consensus items through the voting tools. I love to use the voting tool in training sessions to verify everyone understands particular policies and procedures. In the past, ensuring each attendee understood the material was hard to track. Attendees are sometimes hesitant to speak up in a group setting. Now with the voting feature I can determine who needs more training, preventing non-compliance.

Before MeetingBooster, I had three different forms to fill out for each audit, now I can assign tasks viewable by the attendee and any management that needs to view it all in one place. Furthermore, I can capture exactly what was said by whom using the MeetingBooster tools. I can view and assign tasks live while conducting the audit. I can assign CARs and closure timeline in MeetingBooster, which is sent to the appropriate attendee after the meeting.

Prior to MeetingBooster, I used email folders to store and track data. This took time to search and is a fallible system. With MeetingBooster, I can always login and track tasks status. All the tasks in MeetingBooster will be synchronized with my Outlook tasks. The system automatically synchronizes, ensuring all information is up to date.

My favorite MeetingBooster feature is the analytics. In the past I had to manually track tasks in several excel files, leaving room for incorrect data and human error. MeetingBooster enables me to export tasks to Excel if procedures require I do so. MeetingBooster compiles all tasks across the company or filters by department. Using these features, I can ensure everyone that needs to attend audits have done so, all evidence has been collected and can quickly review all open CARs and tasks I have assigned. The system saves time, improves accountability and ensures all audit documentation is safely stored in one place.