

Participant Engagement

Preliminary Meeting Invitation Email Template

From: <Assessment Facilitator>

Date: <Date>

Subject: TAM Assessment Process Preliminary Meeting; <Process Focus>

To: <Desired Members of Assessment Team>

Cc: <Project Sponsor>

You are invited to attend a preliminary meeting to discuss the process of examining our data and information system practices within <Process Focus>. This process will help our organization improve how data is defined, collected, accessed, analyzed, and used in the decision-making process specific to this asset. You are being asked to be a part of the assessment team for this process.

This preliminary meeting will review the planned assessment process, the roles & responsibilities, and expected level of involvement for team members. This meeting will hopefully receive your commitment as a part of this important effort.

The <Insert Duration> minute meeting is scheduled for <Meeting Date and Time> at <Meeting Location>. Please reach out if you will not be able to attend or if you have any questions.

Thank you,

<Assessment Facilitator>

Participant Engagement

<Process Focus> Preliminary Meeting Agenda

<Meeting Date>

<Meeting Location>

Objectives: Establish process need, inform participants of their need and value of involvement, finalize Assessment team

- | | |
|-------------------|--|
| 5 Minutes | Welcome and Meeting Overview <ul style="list-style-type: none">• Welcome and Introductions• Meeting objectives |
| 15 Minutes | Assessment Process Context <ul style="list-style-type: none">• Process need and focus area context• Anticipated value of improvements |
| 15 Minutes | Roles and Responsibilities of Team Members <ul style="list-style-type: none">• Roles and expected level of involvement |
| 15 Minutes | Assessment Team Implementation <ul style="list-style-type: none">• Assessment team establishment• Additional team members and contributors |
| 10 Minutes | Questions and Feedback |