



CLIO

action management
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A guide to setting up and running Regional User Groups

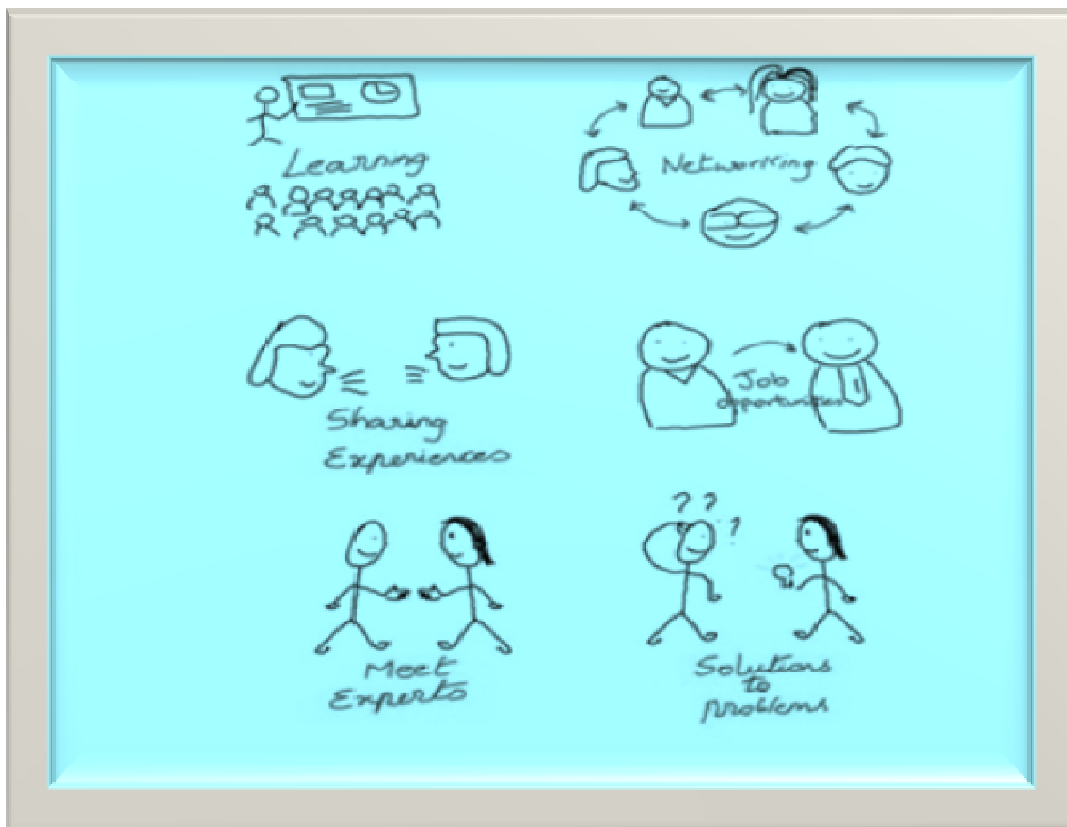
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Definition of a User Group

An organisation of users of a specific product with members that share experiences and ideas to improve their understanding and use of the product. User groups are often responsible for influencing vendors to modify or enhance their products.

Benefits to starting User Groups

Regional User Groups provide you with an opportunity to network with other local users, to share case studies and best practices, to learn tips and tricks, and to influence future product releases.



Planning your first User Group meeting

Work with the Regional Representatives to discuss best meeting date, time, location and agenda items. Also check if there is anyone else within the Organisation that you feel should be involved in the User Group.

- Create the meeting agenda, perhaps involving a speaker either from within the Organisation or from the company providing the product you are discussing.

- Make sure that, if you are inviting outsiders into the Organisation, they are appropriately vetted.
- Select the meeting date and find meeting space central to users in the region.
- Create the invitation – plan for mailed and/or e-mail invitations. Make sure there is a clear RSVP process to finalise meeting details. Microsoft Outlook maybe one of the tools available to you to send an invitation as this will allow persons to acknowledge the invitation. You could also set a reminder to inform them the day before or the morning of the meeting.
- Provide food and refreshments for the final number attending.
- Two days before the meeting, review and finalise all details, location, refreshments, agenda and also attendees,. Make sure that you leave a list of those guests expected to attend with the main reception.

Maintaining your User Group meeting

During the first meeting, recommend that you agree the way forward for the group. Agree on who will chair the meeting, take minutes and organise the dates and locations for future meetings. A suggestion would be that one person should always chair the meeting, one person arranges the dates and location and a person from whichever location is hosting the meeting takes the minutes. Also agree who will be the main contact in relation to taking things back to the service provider. [If you have ideas on ways to improve the system you have then the best person to tell is your contact in the company.???]

If there are people that do not regularly attend the meetings, contact their Force and ask for another representative to be sent. Ideally you will have a minimum of two representatives from each Force attending, as this will make sure that their input into the group is consistent and that any ideas you have can be agreed by all Forces at the meetings.

Make sure that within a day or so after the meeting you send out an Action List, showing all actions raised during the meeting and who is dealing with them.

As soon as practicable, send out the minutes to all attendees for verification. Once verified as a true reflection of the meeting, send out to all those involved in the User Group.

Try to get everyone to agree on a date for the next meeting during the current meeting.

Send a request for Agenda items approximately 3 weeks before an arranged meeting, setting a date for those to be returned. Send the agreed Agenda out and a copy of the minutes of the last meeting 1 week prior to the meeting.

Have any handouts or items to be discussed prepared/copied prior to the meeting.

Set up and test your hardware, i.e. smart boards and projectors, to be used during the meeting.



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