

Making Appointments

WHEN MAKING AN APPOINTMENT

- You should make an appointment in person, by calling or by email. Do not try to make appointments by text, unless you are simply asking a good friend if they would like to have lunch.
- When making an appointment you should give the person your name and the reason for wanting an appointment. You should also ask the amount of time the appointment will take and if you should expect a wait time prior to the appointment.
- Be sure to ask about cancellation policies and procedures, some businesses impose penalties for cancellations that occur less than 24 hours before the appointment.

HOW TO MAKE AN APPOINTMENT BY EMAIL

- If you are making a first appointment and writing to someone you do not know, be sure to give your background information and the reason for requesting an appointment.

Examples

- I am _____ (followed by company info if appropriate) and I would like to meet with you to discuss...
- My name is _____ and I would like to schedule a convenient time to meet.
- Could we meet on Thursday to review...
- We should meet in the next few days to discuss.... When is a convenient time for you?

CONFIRMING AN APPOINTMENT

- Always make sure that you confirm appointments when you make them. When you make an appointment by phone be sure to confirm the appointment by repeating the date and time of the meeting back to the other party and asking if that is correct. This should be one of the last things you do prior to ending the conversation.

Examples:

- Thank you for your response. I look forward to meeting with you on Tuesday the first of October at 10 a.m.
- Thanks, see you on Tuesday at 10 (informal).

You should also confirm appointments the day prior to having them with a short email or call.

CANCELLING AN APPOINTMENT

Sometimes circumstances require that we cancel or change an appointment. Here are some basic steps:

- Cancel as soon as possible, after you discover there is a problem.
- Try to reschedule the appointment before ending the call or at the end of the email.
- Don't forget to notify the people involved about the change or cancelation.

Examples:

- Due to an upcoming business trip, I will be away from October 3-9. Is it possible to reschedule our meeting for the following week? Thank you in advance and I apologize for any inconvenience.
- Due to an unexpected situation, I need to cancel our meeting on Friday.