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## Overview

This unit is about leading meetings in order to achieve their objectives, which may be to solve problems, take decisions, consult with people or to exchange information and knowledge.

The unit is recommended for managers at all levels.

This unit is linked to units:

D12 Participate in meetings.

E10 Take effective decisions.

E11 Communicate information and knowledge.

in the overall suite of National Occupational Standards for Management and Leadership.

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## Lead meetings

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### Performance criteria

*You must be able to:*

- P1 establish the purpose and objectives of the meeting and confirm that a meeting is the best way to achieve these objectives
- P2 prepare carefully how you will lead the meeting and identify who needs to participate
- P3 invite participants, giving them sufficient notice to enable them to attend and stating: „
  - P3.1 the importance of the meeting
  - P3.2 the role they will be expected to play, and
  - P3.3 the preparation they need to do
- P4 circulate relevant information in advance and, if required, brief participants individually on the content and purpose of the meeting and their roles
- P5 set a fixed time for the meeting to begin and end and allocate time appropriately for each agenda item
- P6 state the purpose of the meeting at the start and check that all participants understand why they are present
- P7 clarify specific objectives at the beginning of each agenda item
- P8 encourage all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants
- P9 discourage unhelpful comments and digressions, refocusing attention on the objectives of the meeting
- P10 manage time flexibly, giving more time to particular agenda items, if necessary, whilst ensuring key objectives are met and participants are kept informed of changes in the agenda
- P11 summarise the discussion at appropriate times and allocate action points to participants at the end of each agenda item
- P12 take decisions within the meeting's authority, remit or terms of reference
- P13 observe any formal procedures or standing orders that apply to the meeting
- P14 check that decisions and action points are accurately recorded and promptly communicated to those who need to know
- P15 evaluate whether the purpose and objectives of the meeting have been achieved and how future meetings could be made more effective

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### Knowledge and understanding

*You need to know and understand:*

#### **General knowledge and understanding**

- K1 the importance of establishing the purpose and objectives of the meeting and how to do so
- K2 the importance of confirming a meeting is the best way to achieve these objectives
- K3 the importance of preparing how you will lead the meeting and how to do so
- K4 how to identify who needs to participate in the meeting
- K5 the importance of inviting participants, giving them sufficient notice to enable them to attend
- K6 the importance of informing participants of the role they will be expected to play, the preparation they need to do and the importance of the meeting
- K7 how to identify relevant information participants require in advance of the meeting
- K8 the importance of circulating relevant information in advance and, if required, briefing participants individually on the content and purpose of the meeting and their roles
- K9 the importance of setting a fixed time for the meeting to begin and end and allocating time appropriately for each agenda item
- K10 how to allocate time appropriately for each agenda item
- K11 the importance of stating the purpose of the meeting at the start and checking that all participants understand why they are present
- K12 the importance of clarifying specific objectives at the beginning of each agenda item
- K13 the importance of encouraging all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants, and how to do so
- K14 the importance of discouraging unhelpful comments and digressions, refocusing attention on the objectives of the meeting, and how to do so
- K15 how to manage time flexibly, giving more time to particular agenda items, if necessary, whilst ensuring the key objectives are met and participants are kept informed of changes in the agenda
- K16 the importance of summarising the discussion at appropriate times and allocating action points to participants at the end of each agenda item and how to do so
- K17 the importance of taking decisions within the meeting's authority, remit or terms of reference and how to do so
- K18 the importance of checking that decisions and action points are accurately recorded and promptly communicated to those who need to know

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K19 how to evaluate whether the purpose and objectives of the meeting have been achieved and how future meetings could be made more effective

*You need to know and understand:*

### **Industry/sector specific knowledge and understanding**

K20 industry/sector requirements for leading meetings

*You need to know and understand:*

### **Context specific knowledge and understanding**

K21 the people who need to participate and the roles they will be expected to play

K22 the types and sources of information required in advance of the meeting

K23 the meeting's authority, remit or terms of reference

K24 any formal procedures or standing orders that apply to the meeting

K25 the people who are affected by the decisions and need to know about them

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### Additional Information

#### Behaviours

1. You address multiple demands without losing focus or energy.
2. You show respect for the views and actions of others.
3. You present information clearly, concisely, accurately and in ways that promote understanding.
4. You listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding.
5. You show integrity, fairness and consistency in decision-making.
6. You make best use of existing sources of information.
7. You check the validity and reliability of information.
8. You present ideas and arguments convincingly and in ways that strike a chord with people.
9. You articulate the assumptions made and risks involved in understanding a situation.
10. You take timely decisions that are realistic for the situation.

#### Skills

Listed below are the main generic 'skills' that need to be applied in leading meetings. These skills are explicit/ implicit in the detailed content of the unit and are listed here as additional information.

Building consensus  
Communicating  
Consulting  
Decision-making  
Information management  
Involving others  
Leadership  
Obtaining feedback  
Planning  
Presenting information  
Providing feedback  
Setting objectives  
Time management

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