
Overview

This standard 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.

This standard is relevant to managers and leaders who are required to lead meetings to achieve objectives.

This standard links closely with all the other standards in key area *DD Build and sustain relationships* and particularly to *CFAM&LDD7 Represent your area of responsibility in meetings*.

**Performance
criteria**

- You must be able to:*
- P1 Establish the purpose and objectives of the meeting.
 - P2 Confirm that a meeting is the best way to achieve the objectives.
 - P3 Prepare carefully how you will lead the meeting and identify who needs to participate.
 - P4 Invite participants, giving them sufficient notice to enable them to attend and stating:
 - P4.1 the importance of the meeting
 - P4.2 the role they will be expected to play, and
 - P4.3 the preparation they need to do.
 - P5 Circulate relevant information in advance and, if required, brief participants individually on the content and purpose of the meeting and their roles.
 - P6 Set a fixed time for the meeting to begin and end and allocate time appropriately for each agenda item.
 - P7 State the purpose of the meeting at the start and check that all participants understand why they are present and what is expected of them.
 - P8 Clarify specific objectives at the beginning of each agenda item.
 - P9 Encourage all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants.
 - P10 Discourage unhelpful comments and digressions, refocusing attention on the objectives of the meeting.
 - P11 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.
 - P12 Summarise the discussion at appropriate times and allocate action points to participants at the end of each agenda item.
 - P13 Take decisions within the meeting's authority, remit or terms of reference.
 - P14 Observe any formal procedures or standing orders that apply to the meeting.

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- P15 Check that decisions and action points are accurately recorded and promptly communicated to those who need to know.
- P16 Evaluate whether the purpose and objectives of the meeting have been achieved.
- P17 Identify how future meetings could be made more effective.

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 and what is expected of them.
- 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

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

Industry/sector specific knowledge and understanding

You need to know and understand:

- K20 Industry/sector requirements for leading meetings.

Context specific knowledge and understanding

You need to know and understand:

- 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.

Behaviours

When performing to this standard, you are likely to demonstrate the following behaviours:

- 1 address multiple demands without losing focus or energy
- 2 listen actively, ask questions, clarify points and restate or rephrase statements to check mutual understanding
- 3 present information clearly, concisely, accurately and in ways that promote understanding
- 4 show respect for the views and actions of others
- 5 comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
- 6 show integrity, fairness and consistency in decision-making
- 7 prioritise objectives and plan work to make the effective use of time and resources
- 8 clearly agree what is expected of others and hold them to account
- 9 make effective use of existing sources of information
- 10 check the accuracy and validity of information
- 11 model behaviour that shows, and inspires others to show, respect, helpfulness and cooperation
- 12 recognise when there are conflicts, acknowledge the feelings and views of all parties, and redirect people's energy towards a common goal
- 13 specify the assumptions made and risks involved in understanding a situation
- 14 take timely decisions that are realistic for the situation

Skills

When performing to this standard, you are likely to demonstrate the following skills:

- 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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