

## Organise meetings with customers and external stakeholders

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### Overview

This standard is about organising meetings with customers and/or external stakeholders either individually or in groups. It is about agreeing the purpose of meetings, conducting them in a manner which is acceptable to customers and recording agreed actions and outcomes.

## Performance criteria

*You must be able to:*

1. agree the aims of the meeting with customers and/or external stakeholders and prepare an agenda
2. obtain the relevant information to organise the meeting
3. identify and confirm a time, date and place for the meeting with the relevant customers and/or external stakeholders
4. provide participants with the relevant information and documentation for the meeting in line with your organisational procedures
5. confirm you have all the required information available to achieve the aims of the meeting
6. explain the aims of the meeting with meeting attendees
7. support attendees to ask questions and seek further clarification where required
8. complete the meeting within the identified meeting timescale
9. conduct the meeting in accordance with organisational and relevant legislative requirements
10. ensure that the results of the meeting are recorded in accordance with organisational and relevant legislative requirements

## Knowledge and understanding

*You need to know and understand:*

1. the different types of meetings, formats and procedures for your organisation
2. the aims of the meeting and how these should be agreed in line with your organisational procedures
3. how to organise meetings and make the best use of time and resources in line with your organisational procedures
4. the information required to set up the meetings
5. the information required by meeting attendees
6. the types of requirements for attendees regarding access and facilities at available venues and the support and timing of the meeting
7. the relevant organisational and legislative requirements
8. the relevant health and safety requirements
9. how to maintain confidentiality in accordance with the relevant data protection legislation
10. the types of barriers to communication and how these can be minimised
11. the records which must be produced and kept of the meeting in accordance with your organisational procedures

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<b>Developed by</b>	Instructus
<b>Version Number</b>	1
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<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	Instructus
<b>Original URN</b>	ASTH223
<b>Relevant Occupations</b>	Assistant Portfolio Manager (without portfolio); Resident Involvement Assistant; Revenue Officer/Assistant; Repairs Assistant; Housing Assistant; Housing Administrator; Housing Officer; Housing Manager; Neighbourhood Assistant; Lettings Assistant; Lettings Negotiator
<b>Suite</b>	Housing
<b>Keywords</b>	customers; colleagues; risk; safety; security; support; vulnerable; services; agreements; legislation; documentation; queries; accommodation; organise; property; interpreting