

Lead meetings to achieve objectives

Overview

This standard is about leading meetings to achieve objectives. The meetings may be to solve problems, take decisions, consult with colleagues or to exchange information and knowledge. You determine the purpose of meetings, prepare to lead them and invite participants to attend. You confirm why meetings are important and brief individual participants to contribute when required. To conduct the meetings, you use the relevant technologies or digital tools for face-to-face or remote meetings. During meetings, you encourage everyone to participate and re-focus attention when required. You are also flexible in changing agenda items and timings to ensure that objectives are met. The standard includes summarising discussions and allocating actions to participants that are circulated afterwards.

This standard is for all managers and leaders.

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Performance criteria

You must be able to:

1. establish the purpose and objectives of meetings
2. prepare to lead meetings and identify who needs to participate
3. use the relevant tools and technologies for conducting the meeting face-to-face or remotely
4. invite participants, giving them sufficient notice to enable them to attend
5. state the importance of the meeting, the role participants will be expected to play
6. circulate information in advance to enable participants to review and prepare
7. consult with relevant colleagues and prepare to represent their interests and opinions
8. brief participants on the content and purpose of meetings and their roles, when required
9. set time for meetings to begin and end and allocate time for each agenda item
10. check that all participants understand why they are present and what is expected of them
11. clarify specific objectives at the beginning of each agenda item
12. present information at meetings to develop the understanding of other participants
13. present your opinions and the interests of those you are representing persuasively, providing evidence to support your case, where required
14. encourage all participants to make contributions from their perspectives, whilst acknowledging and building on their contributions
15. re-focus attention on the objectives of the meetings when unhelpful comments and digressions occur
16. identify any issues emerging from discussions which impact on your area of responsibility
17. propose and evaluate possible solutions which meet the needs of your area of responsibility, other teams and your organisation
18. acknowledge and constructively discuss information and opinions provided by your colleagues
19. clarify decisions taken on the various agenda items, where necessary
20. manage time flexibly, giving more time to agenda items, if necessary, whilst ensuring key objectives are met
21. inform participants of changes in meeting agendas when these happen
22. summarise discussions at key points during meetings
23. allocate action points to participants at the end of each agenda item
24. take decisions within the meeting's authority, remit or terms of

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- reference
25. observe any formal procedures or standing orders that apply to the meeting in accordance with your organisation's requirements
 26. check that decisions and action points are recorded and communicated to participants
 27. evaluate whether the purpose and objectives of the meetings have been achieved
 28. identify how future meetings could be improved
 29. follow the legal, organisational, codes of practice and policies relevant to your role when leading meetings to achieve objectives

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the importance of briefing yourself on the purpose, objectives and agenda of the meeting
2. how to identify relevant information for meetings and clarify your opinions on the various agenda items
3. the importance of consulting relevant colleagues in your area of responsibility, and how to develop your understanding to be able to represent their interests and opinions
4. the importance of circulating information in advance and briefing participants individually on the content and purpose of the meeting and their roles
5. how to inform participants of the role they will be expected to play, the preparation they need to do and the objectives of the meeting
6. the time for meetings to begin and end and duration for each agenda item
7. the importance of confirming a meeting is the best way to achieve objectives
8. the importance of preparing how you will lead the meeting and how to do so
9. how to identify who needs to participate in the meeting and the inputs you require from them
10. the importance of inviting participants, giving them sufficient notice to enable them to attend and contribute to the agenda
11. how to identify the information that participants require in advance of meetings
12. the importance of presenting relevant information and opinions during the meetings and how to do so
13. the ways to identify and articulate any issues and problems emerging from discussions, and how to contribute to resolving them
14. how to present your opinions and the interests of those you are representing persuasively and why this is important

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15. 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
16. how to clarify specific objectives at the beginning of each agenda item and the impact this has
17. the ways to encourage all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants
18. how to discourage unhelpful comments and digressions, and refocus attention on the objectives of meetings
19. how to manage time flexibly, giving more time to agenda items, if necessary, whilst ensuring the key objectives are met and participants are kept informed of changes in agendas
20. the importance of summarising the discussion at key points and allocating action points to participants at the end of each agenda item and how to do so
21. how to take decisions within a meeting's authority, remit or terms of reference and how to refer decisions to colleagues when required
22. the importance of checking that decisions and action points are accurately recorded and promptly communicated to participants
23. how to evaluate whether the purpose and objectives of meetings have been achieved and how future meetings could be made more effective

Industry and sector specific knowledge and understanding

24. the industry and sector requirements for leading meetings
25. the legal, organisational, codes of practice and policies relevant to your role when leading meetings to achieve objectives

Context specific knowledge and understanding

26. the colleagues who need to participate in meetings and the roles they will be expected to play
27. the tools and technologies for conducting the meeting face-to-face or remotely
28. the types and sources of information required in advance of meetings

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29. the meeting's authority, remit or terms of reference and any formal procedures or standing orders that apply to the meeting

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Skills

1. Building consensus
2. Communicating
3. Consulting
4. Decision-making
5. Information management
6. Involving colleagues
7. Leadership
8. Obtaining feedback
9. Planning
10. Presenting information
11. Providing feedback
12. Setting objectives
13. Time management

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