

# Unit 23: Supporting Business Meetings

**Unit reference number:** F/501/7240

**QCF level:** 1

**Credit value:** 4

**Guided learning hours:** 30

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## Unit aim

This unit focuses on providing support for a business meeting. Learners will be introduced to the tasks involved in preparing documentation and will learn the requirements for supporting meetings successfully. Learners will need to be aware of the requirements for different types of meetings, such as internal meetings and meetings involving people from outside the organisation.

As this will involve working with others, learners will need to be aware of behaviour appropriate to the formality of the meeting and the participants.

## Unit introduction

Administrative staff are often involved in the setting up of business meetings and then supporting the actual meeting. Learners need to understand the processes involved in setting up a meeting including inviting delegates, booking venues and refreshments, ensuring relevant documentation is available etc. Learners also need to know their role in supporting the meeting for example ensuring the meeting room is laid out in accordance with the chair's requirements, making notes, ensuring delegate needs are met. The final outcome focuses on follow up activities which may include sending notes to delegates, action points etc.

Where possible, learners should be given the opportunity to observe different types of meetings to gain an understanding of how personnel support meetings. Learners could also have the opportunity to participate in role play to practise the skills required.

## Essential resources

Centres need access to a suitable meeting room with facilities for learners to practise and develop their meeting support skills. This may be the classroom, meeting rooms at the centre or through a visit to a local business. Role play and simulations provide valuable opportunities for learners to practise skills. Examples of action planning checklists would be useful. Guest speakers and attendance (even briefly) at different business meetings can provide a valuable input to support learning.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria	Unit amplification
1	1.1 Know what is required to hold a business meeting	<ul style="list-style-type: none"> <li>□ <i>Requirements:</i> date of meeting; likely length of meeting; number of participants; location, e.g. in house, off site, number of rooms; size of room(s); resources to support the meeting, e.g. equipment, refreshments, documentation; participant list; supporting meeting organiser</li> <li>□ <i>Types of meeting:</i> formal, e.g. meeting involving people outside the organisation; informal, e.g. team briefing, staff training; location, e.g. in-house, off-site</li> </ul>
	1.2 Identify the types of documentation which support business meetings	<ul style="list-style-type: none"> <li>□ <i>Documentation:</i> agenda, records of previous meetings, e.g. minutes, other supporting documentation, notification to delegates, presentations</li> </ul>
2	2.1 Be able to set up a room for a meeting	<ul style="list-style-type: none"> <li>□ <i>Setting up the room:</i> making up and setting out delegate packs; confirming refreshment availability, e.g. consumables, cups, timing of refreshments; equipment, e.g. flipchart and pens, data projector, power supply; temperature; lighting</li> </ul>
	2.2 Set up a room for a meeting	<ul style="list-style-type: none"> <li>□ <i>Order of performing tasks:</i> following instructions; order of tasks; completion of tasks to time</li> </ul>
3	3.1 Be able to support a meeting	<ul style="list-style-type: none"> <li>□ <i>Contribution:</i> welcoming delegates, e.g. signing in, providing name badges if appropriate; recording attendees and non-attendees; taking simple notes; serving refreshments</li> </ul>
	3.2 Take notes at a meeting showing the key action points agreed	<ul style="list-style-type: none"> <li>□ <i>Taking notes at meetings:</i> taking notes at meetings to practice note taking, providing back-up notes for minute taker at meeting, identifying key action points</li> </ul>

Learning outcomes		Assessment criteria	Unit amplification
4	Be able to complete follow-up activities after a meeting	4.1 Clear a room after a meeting	<ul style="list-style-type: none"> <li>□ <i>Clearing a room</i>: timing, e.g. ready for next meeting, after participants have left; helping colleagues, e.g. taking papers and equipment back to office, awareness of the need of senior staff for privacy; tidying up, e.g. removal of waste, retaining confidential documents, identifying material for secure disposal; leaving room as you would expect to find it</li> </ul>
		4.2 Complete follow-up activities after a meeting	<ul style="list-style-type: none"> <li>□ <i>Follow-up activities</i>: having notes checked for accuracy; distributing documents after the meeting, e.g. notes/minutes, copies of slides, delegate lists</li> </ul>

## Information for tutors

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### Delivery

Delivery of this unit will focus on learners developing the practical skills involved in setting up, supporting and clearing up after a meeting. It would be useful for learners to investigate different types of meeting held in the centre to determine levels of formality and the types of procedures followed. The range of tasks involved in supporting meetings is varied and, initially, learners can be introduced to the practical requirements, such as booking venues and equipment, as well as other preparatory work including sending information to attendees and the organisation of resources. Learners can work in groups and visit a suitable local organisation to research the administrator's responsibilities for setting up the meeting room, complying with health and safety requirements and assisting delegates. Findings can be presented to the rest of the group for further discussion. Learners can work in groups to share experiences of attending meetings, listing the requirements for a successful meeting. Case study material may be helpful to learners as it could give them the opportunity to plan for a mock meeting. The use of role-play scenarios would give learners the opportunity to practise setting the room up for a meeting in class and also the opportunity for other learners to give feedback on the organisation of the meeting. At all times learners should be encouraged to give constructive and positive feedback. It would be useful to show learners video/DVD clips of meeting protocols and then let them discuss the types of planning problems that can happen and how these can be dealt with.

It is important for learners to practise note taking at meetings. However learners should not be expected to be the sole note taker at meetings, but to provide additional notes as a back-up, identifying key action points. The meetings can be informal.

Finally, in consolidating learning outcome 4, it would be beneficial for learners to practise clearing a room after a meeting. There are specific points to observe when clearing and vacating a meeting room, such as ensuring that the room is clean and tidy; that equipment and any forgotten personal belongings have been returned; that any relevant documentation is dealt with according to instructions; and that confidential material is not left behind. Tutors should raise the issue that sometimes senior staff may wish to continue discussions after the meeting, and therefore need privacy before the room is cleared. Learners could work in small groups to prepare a presentation or poster on the follow-up activities which should be completed after the meeting.

## Outline learning plan

The outline learning plan has been included in this unit as guidance.

### Topic and suggested assignments/activities

Introduction to unit and structure of the programme of learning.

Tutor-led discussion on different types of business meetings – why are meetings held? What are the different types of meetings that take place within the centre?

Learners to watch a DVD to observe a formal meeting, or if possible, to observe a formal meeting taking place in centre or a business.

Guest speaker, or speaker from centre to speak about the administrator's responsibilities for setting up a meeting room. Learners to prepare questions for the speaker.

Assessment – learners to produce a check list of requirements for setting up a formal meeting (learning outcome 1).

Tutor-led discussion on the range of documentation required to hold a meeting. What is the purpose of these documents?

Assessment – learners to complete a grid showing a list of documents required to hold a business meeting. Learners to state their purpose (learning outcome 1).

In small groups, learners to discuss the stages for setting up a room to hold a meeting.

In small groups, learners should practise setting the room up for a formal and an informal meeting, followed by peer assessment and tutor feedback.

Assessment – tutor to provide learner with a scenario for a business-related meeting e.g. a meeting to discuss a planned trip overseas for staff. Learner to prepare a written plan for setting up a room for a meeting, and then to set up the room according to the plan (learning outcome 2).

Role-play exercises – learners to practise welcoming delegates, taking a register, and offering refreshments to delegates.

Note-taking activity – in pairs, one learner must talk for one minute, while the other must take notes on the key points. The learners should then swap roles and repeat the exercise. They can then feedback to the group.

Tutor-led discussion on clearing a room and the activities to be carried out after a meeting. Why are these important?

In small groups, learners to prepare a checklist for clearing a room after a meeting.

Learners to prepare a poster to illustrate follow-up activities required after a meeting, including proofreading notes, preparing a distribution list, and providing delegates with a copy of slides/handouts from the meeting.

Assessment – in small groups, learners to role-play supporting a meeting. The learner should take brief notes listing those present at the meeting, and any action points agreed. Learners should then clear the room after the role-play activity, according to their checklist. Learners should check and prepare their notes in order to provide these to delegates, with a list of the delegates and any paperwork tabled at the meeting (learning outcome 3 and learning outcome 4).

If appropriate, learners could be assessed while supporting a suitable meeting in the centre, or in a local business.

Assessment feedback, review and evaluation of unit.

## Assessment

To meet 1.1, learners need to be able to show they know what is required to support a formal business meeting. Evidence could be a written list identifying the requirements for one formal meeting, or this criterion could be evidenced through oral questioning.

Assessment criterion 1.2 requires the learner to identify the documents used to support business meetings. Evidence may be a written list of documents identifying a purpose for each type of document. A pro forma could be used for this purpose. Alternatively, this criterion could be evidenced through oral questioning.

For 2.1 and 2.2, the learner needs to know the stages for setting up a room and demonstrate carrying out these tasks for one type of meeting. Ideally, this would be a real work-based meeting but, where this is not possible, the meeting could be based on a scenario given by the tutor with a clear business purpose. Evidence may be a written plan with a checklist of activities for setting up a room supported by an observation record confirming the learner can set up a room appropriately.

For 3.1, the learner should demonstrate providing appropriate support during the meeting. Evidence may be an observation report from the tutor confirming appropriate support was provided.

To meet 3.2, the learner should produce simple notes of the meeting. It is not expected that the learner will produce detailed minutes, but the notes should include those present and key action points agreed.

To meet 4.1, the learner needs to show they can follow instructions for clearing a room by undertaking specific administrative tasks and for the room to be ready for the next user. Evidence may be an observation report from the tutor confirming that the room was cleared appropriately.

Assessment criterion 4.2 could be assessed through small group discussion or one-to-one questioning by the tutor to establish that the learner knows the types of information which would be distributed to delegates after the meeting. All evidence must be available for both internal and external verification purposes.

## Suggested resources

### Books

Tetley C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

### Websites

<a href="http://www.businessballs.com/meetings.htm">www.businessballs.com/meetings.htm</a>	Advice on running meetings
<a href="http://www.effectivemeetings.com/meetingplanning/agenda/agenda.asp">www.effectivemeetings.com/meetingplanning/agenda/agenda.asp</a>	Advice on planning for and running meetings, including writing an agenda
<a href="http://www.hse.gov">www.hse.gov</a>	Health and Safety Executive - information on health and safety in the workplace
<a href="http://www.meetings.org/meeting4.htm">www.meetings.org/meeting4.htm</a>	Information on meeting and conference venues
<a href="http://www.skillsca.org">www.skillsca.org</a>	The Council for Administration