

# Cast the Roles for an *Effective* Meeting

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Do you want to have more effective meetings? One way to do so, is to eliminate all spectators (non-participants) from your meetings. How do you do this? By limiting your invitations to the people who need to participate in the meeting. By understanding the roles that people need to play in order for you to achieve the purpose of the meeting. By casting the roles that people will play during the meeting.

Cast your meetings. Cast each individual role. Direct each cast member to play an effective role.

## Why are we meeting today?

- What do you want to accomplish?
- Who needs to be involved in order for you to accomplish this?
- The answers define the purpose of your meeting. Now, you have the information that you need to cast the roles that people will play in your meeting.

## Who needs to attend?

- The person who can actually make a decision on the items on your agenda. You can't cast this role – this is a real person who has the authority or is empowered to act on behalf of the person who is responsible for the decision.
- The people who can share the relevant knowledge or expertise that your team needs before reaching a decision.
- Representatives of the stakeholders who will be affected by your decisions; who will be charged with implementing the decisions that you reach in your meeting.

## Cast your meeting

Now that you have this information, it is time to “Cast Your Meeting.” Now that you know the purpose of your meeting and the roles that are required to help you to meet your purpose, cast the best people to fill these roles.

## Leader

The leader's role is “the initiator.” This is the person who called the meeting. The person who determined the need for the meeting.

The leader is responsible for clearly communicating the purpose of the meeting to all who are invited to participate.

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In collaboration with others, the leader will create the agenda for the meeting. The leader will clarify the roles and the responsibilities of each meeting participant in order to ensure that the purpose of the meeting is achieved.

### **Facilitator**

This is a key role to cast. Usually, the leader will perform the role of process manager. However, depending on the agenda item, there will be times when another person - who has a specific skill - will play this role. For example, during a brainstorming session.

The facilitator is responsible for keeping the meeting on track – in order to accomplish the purpose of the meeting and to ensure full and balanced participation. Facilitators need to remain neutral during the discussion period leading up to a decision. This is a special skill and, sometimes, it is best to cast a person from another division to perform this role.

### **Recorder**

This is a very important role – take time to carefully cast it. And, train others to be able to play this part.

The main responsibility of the recorder is to capture the discussion points and the key take-away points for each agenda item.

In addition to reporting the decisions made during the meeting, it is important to record the process used for reaching the decision. Was the decision made by majority vote, consensus or by the leader?

I recommend assigning and clarifying roles and responsibilities during the meeting and the recorder plays a key part in capturing these accurately.

It is important that the reporter remain neutral in this role. So, it is wise to have another person assume this role if it is necessary for a participant to “step out of character” in order to contribute a specific point of view.

And of course, the reporter must distribute accurate notes of the meeting to all stakeholders on a timely basis once the meeting has concluded.

### **Timekeeper**

In my experience, I find that this role is seldom cast – and that is a mistake. An effective agenda schedules a specific time allowance for each item so that the meeting can accomplish its purpose. If these scheduled time allotments are consistently ignored it will be difficult to reach the objective for the meeting.

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If the leader is actively participating in the discussion, then it is difficult to keep track of the time. This is one reason to cast the role of the timekeeper – to ensure that all participants respect the purpose of the agenda and the need to keep the meeting on schedule.

### **Parking Lot Manager**

Don't laugh – this is an important role. When people are allowed to “high jack” the agenda by bring up unscheduled items or insisting that a decision be reversed or revisited, the meeting loses its focus and will not achieve its purpose. Use a flip chart or a white board to itemize “parking lot” issues to include in a future agenda. Then manage the parking lot to ensure smooth entrances and exits.

### **Subject Matter Experts**

Frequently, you will need to invite subject matter experts to your meeting to share technical information or to provide specific reports to help you to solve a problem or to make a decision.

The role of the Subject Matter Expert is contributor. Usually, they do not participate in the discussion and they may be unfamiliar with the other meeting participants. So, it is important that you provide direction and guidance prior to their presentation. And, the Timekeeper can assist them in observing the time allocation for their presentation.

### **Stakeholders**

When you are making a decision in a meeting, I encourage you to limit the number of participants – but do not limit discussion of the number of issues that affect all stakeholders. Cast the roles for participants to gather feedback from and to express the points-of-view of the key stakeholders.

A trained facilitator will ensure that all points-of-view are heard during the discussion period. Limiting the number of delegates will make it easier to reach a decision that is fair to all concerned.

After the meeting, the delegates report back to the stakeholders that they represented during the meeting.

### **Devil's Advocate**

Be careful not to reach decisions too quickly. Be on the lookout for symptoms of “group thinking.” Cast the role of the Devil's Advocate to challenge assumptions; to ask “what-if” and “why-not” questions.

I recommend that you rotate this role so that one individual is not permanently cast in this role – you need this role – you do not want to create the stereotyped reputation of a “trouble maker.”

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### **Participants in the Meeting**

When you learn how to define, cast, and direct the roles for that each person plays during your meeting you will gain active participation. This process will help to minimize “agenda high jacking” and maximize the energy level of your meeting participants. You will solve more problems, reach better decisions and share the most important information with each other.

### **The Effective Meeting Series**

This is the second installment in my “Running Effective Meetings” series. You can view the other installments on my website – [www.thecompanyrocks.com](http://www.thecompanyrocks.com) - or view and download them at the iTunes Store. I invite you to subscribe to the “*Danny Rocks Tips and Timesavers*” podcast.