

Starring Roles

For a team to work together successfully, everyone must know their role in a meeting. In his book, *The Fisherman's Guide to Selling: Reel in the Sale – Hook, Line and Sinker* (Adams Media, March 2007), author Joe DiMisa outlines the six most important roles in a meeting:

- 1. The Leader:** This person pilots the meeting or discussions. "This is a one-person role," advises DiMisa, who is also senior vice president and principal at Sibson Consulting. "Even in the case of co-facilitators, one person must hold ultimate accountability. Work this out in advance of the meeting."
- 2. Color commentator:** This person can add "color" or important facts or statistics relevant to key issues.
- 3. Note taker:** A very important role, this person records comments, decisions, agreements, needs, and action steps.
- 4. Bagman:** This person brings all the materials for your presentation including handouts, copies, collateral, and equipment. "This person ensures that everything you need for an effective meeting is assembled, accurate, and available," says DiMisa.
- 5. Name taker:** This person records meeting participants and collects their contact information such as business cards.
- 6. Coordinator:** "The account person typically assumes this role," says DiMisa. "But it can be delegated to an administrative assistant, note taker, bagman, or the name taker." This person makes sure everyone has a role and understands that role and its importance to the meeting.

Note: One person can actually assume the roles of note taker, name taker, and bagman. In the end, DiMisa advises us to take a cue from our customers. If your customer will be alone, it's wise not to bring in the whole team or it might overwhelm him or her. The best way to determine the number of people who will support you at the meeting is to ask the customer upfront, how many will attend? This way, there are no surprises.