Cobalt Strategic Meeting Worksheet

Attendance: A Role Play

If they're not critical to the success of the effort — they don't need to be in the room. Consider the roles that must be filled and assign the right person/people for the task.

INSPIRE | Who can provide the vision/context for the objectives?

Whether you need the voice of inspiration or the reality check of the burning platform, the leader who brings this perspective can set the tone and then check back in at the end for the report-out. Keep in mind, unless they fill another role, presenters only need to attend for the time they are speaking (and often should be limited to then so they don't inhibit participation).

INFORM | Who can provide the critical information attendees need as a baseline?

Consider the subject matter experts to provide the background needed/helpful for the "ask" ahead. Whether they know the changing industry, the department's finances, the competitive environment, the technology being implemented, or the patients — their insights help everyone in the room start at the same level of understanding and allow for informed, more confident participation.

ENERGIZE | Who has the perspective/knowledge/experience to generate ideas/deliver on the objectives?

These are your core attendees: the problem-solvers, idea generators — they are the way forward. The goal is to ensure diversity and enterprise perspective, but keep it to a manageable group to allow for equal participation. Control what you can, and don't be pressured to include more than necessary.

ENABLE | Who needs to be in the room to ensure decisions/next steps can move forward without additional review/approval?

To effectively meet the requirement of this role, and enable you to deliver on your objectives, these key stakeholders usually need to be engaged during the planning of the event.

ENSURE | Who can represent the group that would be affected by the output?

The best way to ensure successful implementation following your event is to have the teams responsible for the roll out represented in the room — get as close to the "front lines" as you can.

EXPAND | What other groups from other parts of the organization might share perspective/experience or be interested in the discussion/ outputs/results?

Here's your diversity angle: invite thought leaders who bring a different perspective. And remember, thought leaders don't mean hierarchical leaders. The most recent hire might have the ability to see what others cannot.

cobalt

cobaltcommunications.com

2515-D East Market St.
Harrisonburg, VA 22801

OFFICE **540.689.0288**