

The background is a dark grey field filled with a repeating pattern of small, light grey icons. These icons represent various concepts related to work, technology, and community, such as Wi-Fi signals, people walking, trees, sofas, meeting tables, presentations, pie charts, groups of people, microphones, people sitting at desks, lightbulbs, houses, people at computers, laptops, video conference windows, keys, groups of people, people at a presentation, globes, sofas, trees, bicycles, and cafe storefronts. The text is overlaid on this pattern.

Hybrid Meeting Best Practices

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Hybrid Meetings Best Practices

Many of the best practices for hybrid meetings are the same for fully in-person and fully remote meetings.

Create a focused agenda that guides the conversations and ensures you productively address all important discussion items.

Hybrid meetings will work best if the organizers focus on the needs of the remote employees first, or at least equally, to the needs of the in-person employees.

Consider if you need a hybrid meeting at all. If you have some employees in the office, and some who are remote, it doesn't mean you'll need to have a hybrid meeting:

- If the vast majority are in-person → Hybrid
- If only a minority are in-person → Everyone should act "remote" in the sense that everyone stays in their offices / home offices, uses Zoom, WebEx, etc., so that all are attending in the same way.



Hybrid Meetings Best Practices

Hybrid meetings need to be designed with intention and require more effort for all participants. To ensure that a meeting is necessary, make sure you answer the following questions before scheduling a meeting.

What is the purpose of the meeting?

There must be a clear outcome of having a meeting.

Is the meeting for information gathering via discussion or a simple share out?

If a simple share out, find a different mode of delivering the information (email, chat, etc.).

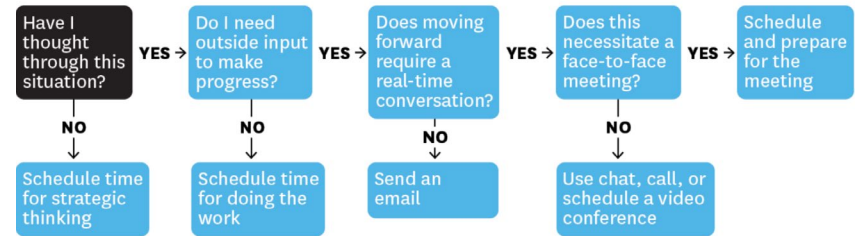
Where will the meeting be located?

If a hybrid meeting is needed, ensure that the room where in-person participants will be seated has appropriate audio and video equipment, as well as a strong internet connection.

What is on the meeting agenda?

The meeting should have a clear agenda, structured around who is speaking, on what topic, and for how long. This agenda should be sent to all participants in advance.

SHOULD I HOLD A MEETING?



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A decision tree provides another way to think through the process.

Hybrid Meetings Best Practices

Pre-Meeting

All good meetings require careful planning, but hybrid meetings need a little extra consideration.

- Your agenda in a hybrid meeting should be concise but conversational, focusing on essential talking points and bringing remote members into the conversation regularly.
- Plan with engagement and convenience in mind.
- Incorporating variety, move your most important points to the beginning of the meeting, to take advantage of your remote members' focus.
- Ensure your remote attendees should be able to access the agenda early, so they can prepare notes on key topics and address the group when they need to.

Hybrid Meeting Template

<p>Meeting ground rules</p> <p><i>Add a link here to make sure your meeting ground rules or working agreement is in place.</i></p>	
<p>Why this needs to be a meeting</p> <p><i>Adjust these items to your own preferences. Make sure that a meeting is the best the issue you face.</i></p> <ul style="list-style-type: none">• <input type="checkbox"/> This is a regular meeting we've all committed to• <input type="checkbox"/> We are talking about a topic that greatly benefits from everyone being time• <input type="checkbox"/> We are kicking off a big project and we want everyone on the same p:• <input type="checkbox"/> Having this meeting will save a lot of back and forth communication	
<p>Pre-work</p> <p><i>Share any context that participants need to know before they attend the meetin you want everyone to read or prepare ahead of time such as slides, documents specific about what you want people to do before the meeting starts to maximiz time. Should participants bring anything to the meeting?</i></p> <ul style="list-style-type: none">•	
<p>Check-in question</p> <p><i>Check-in questions help to set a positive and inclusive tone for everyone. Don't</i></p> <ul style="list-style-type: none">• A curated list of 100+ check-in questions	
	<p>OKR reminder</p> <p><i>Your OKR (objective and key result) gives your team the alignment they need. It answers the question "Why are we doing this?" and "How will we know when we've done it?"</i></p> <ul style="list-style-type: none">•
	<p>Agenda</p> <p><i>Frame these as questions, not items.</i></p> <ol style="list-style-type: none">1. <p>What decisions need to be documented?</p> <ol style="list-style-type: none">1. <p>Who committed to specific actions?</p> <ol style="list-style-type: none">1.

Hybrid Meetings Best Practices

Technical Considerations Best Practices

When holding a hybrid meeting, be sure to test the technology in the meeting space before the actual meeting. Even if you hold in-person meetings in the same space without issue, hybrid meetings require different technology considerations to ensure that all participants feel engaged and included.

Collaboration:

Be sure to share all documents electronically before the meeting.

Consider using digital collaboration tools, such as Sharepoint, Box, Google Drive, screen annotations, virtual whiteboards, or the chat function within the virtual platform.

Avoid having remote participants look at information written on the whiteboard in the physical meeting space via video.

Video:

In-person participants should be able to see remote participants. If available, consider having a projector display the remote participants so that they are large and more easily seen by everyone in the room.



Hybrid Meetings Best Practices

In-Meeting

- Stick to the agenda during the meeting and have someone take notes that can be referred to afterward including key takeaways, decisions, or action items, and who is responsible for completing them.
- Have a facilitator lead the meeting. There should also be someone keeping an eye on chat comments, raised hands, and other activities of virtual participants.
- Establish a rule that everyone who wants to speak will raise their hand first. This will help both in-person and virtual participants avoid speaking over one another.
- Assign an in-person partner for each virtual participant. The role of the in-person participant is to ensure that their virtual partner is seen, heard, and engaged.
- When asking for feedback or questions, start with the remote participants first.
- Specifically call on people by name when asking for feedback or giving an individual the chance to speak. Avoid general statements, such as “Does anyone online have anything to say?” This usually results in silence and makes virtual participants seem like outsiders.
- Make sure that the person speaking says their name before they start speaking. This helps everyone follow along, regardless of their location.

