

Tech Toolbox: 4 Best Practices for Hybrid Meetings

Technology, Privacy, and eCommerce



One of the consequences of the COVID-19 pandemic is that many more employees work remotely more often. Some of them are remote most of the time, only traveling to their corporate offices when circumstances demand it, and perhaps only quarterly or annually otherwise. Others have been asked to spend at least two or three days each week in the office, depending upon departmental demands. One of the questions a hybrid schedule raises is, what does this mean for conducting meetings?

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A lot of us have spent entirely too much of our careers participating in in-person meetings, with an occasional dial-in from a traveler. Many of us would likely also agree that all in-person meetings are generally more satisfying than most of the all-remote meetings we have had to endure during COVID, because humans are social beings (and because a great deal of our communication is non-verbal).

But this is only true to the extent that those in-person meetings are well run. One of the interesting things we have learned during COVID is that there are certain tricks we can use to make remote meetings more productive than some of our in-person ones have been.

It turns out that many of those tricks, such as circulating agendas in advance, making sure that all participants get the opportunity to speak, keeping side conversations and interruptions to a minimum, and so forth, are also things that experts have been recommending for in-person meetings for decades.

But even if all the meeting best practices are followed and adapted appropriately for all meeting types, in general one might rank the efficacy and engagement in those meetings in this order:

- Best: all in-person;
- Second best: all remote; and
- Last: hybrid.

That's because all the participants in an in-person meeting and all the participants in an all-remote meeting operate on an equal footing.

Remote participants in a hybrid meeting are at a disadvantage compared with those participating in person because, in general, the technology that allows for remote participation has a hard time competing with the impact that physical presence provides.

Anyone who has participated remotely in a primarily in-person meeting will be able to acknowledge this disparity.

Here are some of my recommendations.

There are a number of good resources available on how best to conduct hybrid meetings:

Hybrid Meetings Guide (Microsoft)

7 Best Practices for Hybrid Meetings (Lattice)

Best Practices for Meetings in a Hybrid World (Georgia Tech)

Hybrid Meeting Technology Best Practices (University of Colorado Boulder)

1. Follow the general principles for any successful meeting

Trim the participant list to the bare minimum of appropriate participants. We all know that many meeting organizers err on the side of including too many because they aren't sure whose input may be needed or because they don't want to risk offending anyone. There are better ways to handle those issues that are well known.

This is particularly important in a hybrid meeting context, because it is even harder to have an effective hybrid meeting if there are too many participants trying to chime in (or avoid chiming in).

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Circulate an agenda and all documents in advance and ask all invitees to review them and let you know if they think they won't add value by attending.

Try to keep your meetings brief; if you need more than an hour or so, it may be best to break the topics up into several meetings, because longer meetings tend to erode focus. If you cannot break the meeting into smaller bits, then at least plan for breaks every hour and note that in your agenda.

Ask which invitees will be participating remotely so you can prepare them in advance to follow your remote/hybrid participation guidelines.

2. Choose your meeting type carefully

If hybrid meetings are the hardest to do properly, in terms of ensuring high levels of engagement and effectiveness, reserve them for times they are more likely to work well.

Large meetings with few remote participants may be the most difficult to do properly, for example, and long meetings can be even more exhausting for remote participants; meetings requiring close examination of equipment or other physical objects will obviously not be suitable for remote participants.

Hybrid meetings work better for smaller meetings (of twenty participants or less) when the participants have become accustomed to the chosen format and technology, their own roles in those meetings, and to having the same sets of participants. So, if you plan on having a series of meetings on the same topics, try to kick them off with an all in-person or all remote meeting if possible before transitioning to hybrid.

Hybrid meetings will also work better when the participants can become actively engaged in and enthusiastic about the discussions, such as brainstorming sessions and the like.

3. Take into account the technology you will be using

I have been a remote participant in meetings in which my only connection to the meeting was by way of a conference phone located in the center of a long conference room table. I often found that I could hear participants seated near the microphone much better than those further away.

Now, there are higher-tech conferencing equipment options available like Zoom Rooms and Cisco Telepresence. Some of them do a good job of emphasizing the currently active speaker and some don't.

Apple's Center Stage technology and gadgets like Owl Labs use specific technology to help track participants who are moving around the conference room. This is a big help in circumstances in which the active speaker needs to draw on a whiteboard, point to an exhibit, etc. It also can help prevent remote participants from fading into the background of in-person participants' awareness, by making the remote participants appear livelier, less like a talking head.

Video conference platforms work better than they used to, but all have their own peculiarities. The main point is to evaluate the tech your company has available and understand its strength and weaknesses so you can try to take advantage of the former and counteract the latter.

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Regardless of which platform you use, test your equipment in advance so that you can determine where best to place it and how to arrange seating for the in-person participants to heighten their impact on the remote participants.

4. Address camera use

In all-remote or hybrid meetings, all the remote talking heads should have equal impact but they often don't.

Some participants find adding video to be either optional or inconvenient (or both) and so do not authorize the video portions and wind up being represented by dark boxes or other avatars that diminish engagement. Video participation should be encouraged or required whenever possible, because it makes a huge difference in the impact participants will have.

Some participants don't understand how much their lighting or background may influence their on-screen appearance. Offering some guidance or even arranging a test run may help address this. The video cameras people use will also have an impact, so if you plan on regular remote or hybrid meetings, it may be appropriate to provide better cameras than the ones built into many laptops or tablets.

5. Develop guidelines

Finally, I encourage you to develop your own remote/hybrid participation guidelines that describe your group's expectations and the rules of the road for conducting remote or hybrid meetings. Specify not only what you require but why — participants will be more engaged and willing to accept the rules if they know how they will impact the use of remote or hybrid meetings.

In particular, make sure the meeting organizer or host knows that it is her or his responsibility to ensure that all meeting participants, whether in-person or remote, are encouraged to actively contribute. This will likely mean keeping track of the roles you anticipated each invitee to take in being invited and ensuring they have fulfilled your expectations in that regard.

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Hybrid meetings are likely to play a bigger role as time goes on. The technology will improve and so will people's habits and expectations. The best thing your department or company can do is to take the significance of hybrid meetings seriously and try to improve how you handle them as technology and best practices evolve. So, develop your own guidelines and modify them as that evolution occurs.

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