



Successful Hybrid Team Meetings

As teams embark on remote work arrangements, many of us will likely find ourselves in “hybrid” meetings. A hybrid meeting is where some employees are physically in the same place, like a conference room, and some join virtually from their remote workspace. Hybrid meetings are not a new phenomenon and one that is typical of global and geographically dispersed workforces. Can hybrid meetings be successful? Yes, but they require a higher level of intentionality from the manager or the person hosting the meeting.

It is important to note here that teams must find opportunities to meet in person regularly. While hybrid meetings can be successful, in-person meetings benefit team building, strengthening culture, goal setting, and team engagement. Managers should also consider opportunities for teams to meet remotely to level the playing field for all.

How to decide if a meeting should be hybrid, all in-person, or all remote

To help you decide which meeting format is best for your needs, it might help to consider the following:

Meeting Goal/Objective

- If the goal is primarily team building or networking, or to resolve a conflict, it is best to use either “all in person” or “all remote” formats. When all participants use the same meeting format, it is simpler and easier to use activities and ensure consistency of experience.
- If the goal of the meeting is to kick off a project or bring cross-functional teams together for a time-sensitive task, use the hybrid model since it might prove challenging to have all participants attend remotely or in person.
- Managers should identify meetings where they expect everyone on their team to be in person. Scheduling these ahead of time and being planful will help all team members meet this expectation successfully.

People

- Staff who are predominantly in the office benefit from in-person interactions, even if some participants are remote. If all meetings are made remote, over time, staff in the office might start to resent commuting in to spend their day on Zoom or Teams, affecting their morale and sense of belonging.
- Staff who are new and or junior in their role can benefit from getting exposure to other members in person. Receiving impromptu advice from a senior, more tenured colleague can help them build relationships and be successful in their role. This group also benefits from in-person meetings, but hybrid is a better option than all remote when that is not possible.
- In-person or hybrid is also a better option if external clients, vendors, or stakeholders attend in person.

Below are a few tips to help you ensure your hybrid meetings are successful and inclusive.

Planning and Preparation

While it is essential to be planful for all meetings, it is crucial for the success of a hybrid meeting. Hybrid meetings require higher levels of technology use; therefore, it is imperative to plan, test, and have a backup plan to ensure efficiency and effectiveness.

Meeting Invite

- Schedule ahead and ask participants to indicate if they will be in person or remote during the meeting.
- Schedule a conference room. If you will require remote participants to be on video or view a presentation or multimedia items, ensure the conference room has the appropriate technology, designate someone on your team to help with this, and test to ensure everything works.
- Include a virtual meeting link and the conference room location.
- Let remote participants know if they are required to be on camera.
- Let in-person participants know if they will need their laptops or other devices.
- Include the agenda and any materials that will be discussed or reviewed.

Agenda

- Have a clear plan with time allocations for each section and who will present each section.
- If readings or materials will be reviewed, share a digital copy with all participants and make printed copies available for those in person. Include the presentation if a presentation will be used so that remote participants can follow along.
- Meeting start time: Stagger the start times for those who are in person and remote. For instance, the start time for those in person should be five minutes earlier than those participating remotely. Doing this will allow those in person to grab a coffee and find their spot before the meeting officially starts. Everyone should be seated and ready when the remote participants join.
- Include the ground rules for the meeting. See below for an example:

Agreements for a Safe and Brave Space

- Respect all perspectives.
- Be respectful of time limits.
- Listen for understanding.
- Avoid interruptions.
- Refrain from assumptions or judgement.
- Learn from one another.
- Put learnings into practice.
- Ask questions.
- Debate ideas, not people.

Meeting Host and Participant Responsibilities

While the host is primarily responsible for the logistics and facilitating the meeting, everyone has a role in making a meeting successful. When the meeting is hybrid, here are a few tips that might help the host and the participants ensure that the meeting is inclusive, efficient, and effective.

Meeting Host

- If you are hosting and are remote, designate a team member to manage the logistics in the conference room.
- At the start of the call, the host should explicitly state who is on the phone and who is in person by saying each person's name. Doing this is especially important if the remote participants are joining via phone only, or if there are new team members, or if they are participants from across departments and functions. Even when participants are on a webcam, it might be helpful to say the names, as remote employees might not see those in the conference room.
- Review the agenda and include time for breaks if relevant.
- Be mindful of side conversations that might start amongst those in the conference room as the meeting proceeds. Gently bring everyone back to the main topic under discussion. Doing this will help make the meeting equitable and ensure everyone is heard and feels included.
- Pause regularly and check in with remote participants to ensure they can hear and ask them if they have a comment or question. It is essential if remote participants are joining by phone only. It can be challenging for those on the phone to interrupt as they cannot use visual cues like raising their hand.
- Pause periodically to invite questions and comments from everyone.
- Keep track of time and the schedule to ensure all topics are covered.
- Be mindful of new team members or those who are new to the project. Be intentional about including them. They might not be as vocal or comment as readily.
- Be careful to select icebreakers or team engagement tools that align well with in-person and remote employees. In hybrid meetings, use remote-friendly tools. Use activities that everyone can participate in.

In-Person Participants

- Arrive on time.
- Avoid side conversations with those who are in the room with you.
- Say your name before you start speaking for the benefit of those on the phone. It can be difficult for new team members to know who is talking just by their voice.
- Be mindful of your facial expressions when those on the phone are speaking or presenting. Remember, they cannot see you and are missing those cues.
- If you are presenting, let participants know how you prefer to receive questions/comments during or after the presentation. Pause often to check in with remote participants to ensure they can still hear and are following.
- If you are commenting or asking a follow-up question, say the person's name so that everyone is clear about who was being addressed.
- Listen actively for understanding.

- Don't interrupt.
- Debate ideas, not people.

Remote Participants

- Arrive on time. Call into the line and have your camera on so everyone knows you are there. If you are joining by phone only, announce your arrival.
- Be at your desk during the meeting. Avoid walking around or being outdoors.
- Be camera-ready and dressed for work.
- Test your phone and camera ahead of time.
- Use headphones.
- Ensure there are no disturbances from your end. Let those in your remote space know you are busy.
- Keep your microphone on mute when you are not speaking.
- State your name when you speak if you are joining by phone only.
- Participate fully by asking thoughtful questions and providing helpful feedback to the speakers.
- Listen actively for understanding.
- Don't interrupt.
- Debate ideas, not people.