

Guide to hybrid meetings

An article with practical tools for holding good hybrid meetings. These tools can also be used for workshops, events and trainings that involve both physical and virtual participants

Businesses find themselves facing a paradox

The coronavirus pandemic has led to a renewed focus on the benefits of working from home, whilst at the same time dealing with the challenges of working 100% virtually. There is a great deal to suggest that this hybrid work-life is here to stay, placing new demands on our abilities to collaborate across virtual and physical spaces, and timezones.

According to a Microsoft report based on a study of 30,000 people across 31 countries, over 70% of those surveyed want to keep the option of working remotely, while at the same time 67% want to spend more physical time with their team. This is leaving businesses in a paradox that is hard to navigate. Many companies, however, are attempting to accommodate this hybrid working model and in a new McKinsey study, 90% of businesses surveyed said they want to continue offering their employees both the option of home-working and meeting up in the workplace. As a result, the reality for many companies is that they will have to define a set of parameters to achieve a successful hybrid working culture within their business.

Hybrid formats

The hybrid format has an impact on all dimensions of working life within an organisation, from simple meetings to the overall working model. We have divided these hybrid formats into three categories and will tackle each category in our series of articles on Hybrid Formats.

These three categories are:

1) Hybrid meetings and workshops 2) Hybrid management and 3) The hybrid working life. This article focuses on Hybrid meetings and workshops.



Hybrid meetings and workshops

Sessions where some of the participants are in the same physical location, while others are attending the meeting online, involve a certain imbalance and place different demands on participants.

- Facilitating meetings where conditions for participants are not all the same.
- Technical challenges, obstacles and solutions.
- Preparing and designing the hybrid meeting format.
- Hybrid collaboration.

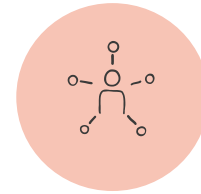
Fig. 1



Hybrid management

Management where geographical spread is a part of the job, and where such geographical spread might involve working across different timezones, cultures, national borders and organisations.

- Remote management, where there is limited physical contact with the manager and other colleagues/team members.
- Understanding communication that takes place digitally and online.
- The management space when people are not in the same place at the same time.
- Getting a grasp of digital resources.



The hybrid working life

The hybrid working life is about different ways for employees to organise their working life where relationships between a business and its workers exist side by side (some are at work, others are working from home or from a completely different location at various times of day).

- Location (Guidelines for where employees can/must work).
- Room design (how do we set up work for hybrid formats – (facilities, meeting spaces, home office, IT equipment etc.)
- Timezones, number of hours per week, working hours and flexibility.
- Inclusion and diversity (how to secure a strong sense of belonging to the organisation if we are working in a hybrid format).
- Processes and norms (meeting culture) what guidelines are established in terms of hybrid meeting culture and ways of collaborating.

Hybrid meetings and workshops

Hybrid meetings and workshops where some of the participants are in the same physical location, while others are attending the meeting online, involve different preconditions for participants from the very get-go. This can make it difficult to keep everyone equally engaged. At the same time, we are growing and adapting all the time as we become accustomed to spending more time together virtually. Where participants previously felt cut off from their team if they were joining in online, you can now turn this to your advantage if you plan your hybrid meeting on the basis of the participants' different circumstances, including the technical capabilities, where they are located, their experience and confidence dealing with technology, and any foreseeable technical difficulties.

As a meeting leader or facilitator, hybrid meetings can feel like an arena where two types of meetings are battling for position, depending on the circumstances. For example, there is a big difference between a meeting where participants are predominantly physically together in a room and one where the majority are attending online.

As a facilitator or meeting leader, it is your job to help the group get more out of the meeting than if they had been left to their own devices, and hybrid meetings in particular require a strong facilitator. In the next section, we go through some of our advice for succeeding as a facilitator of hybrid meetings.



Designing and preparing your meeting

The complexity of the meeting is key to which type of meeting you choose

It's a very good idea to think about what type of meeting you want to hold before sending out invites. What is particularly important when it comes to choosing your type of meeting is the complexity of your meeting. The diagram below shows six basic elements that are involved in any meeting. By placing your meeting in the diagram, you can get an overview of the complexity of the meeting and thus which elements you as facilitator should pay extra attention to.

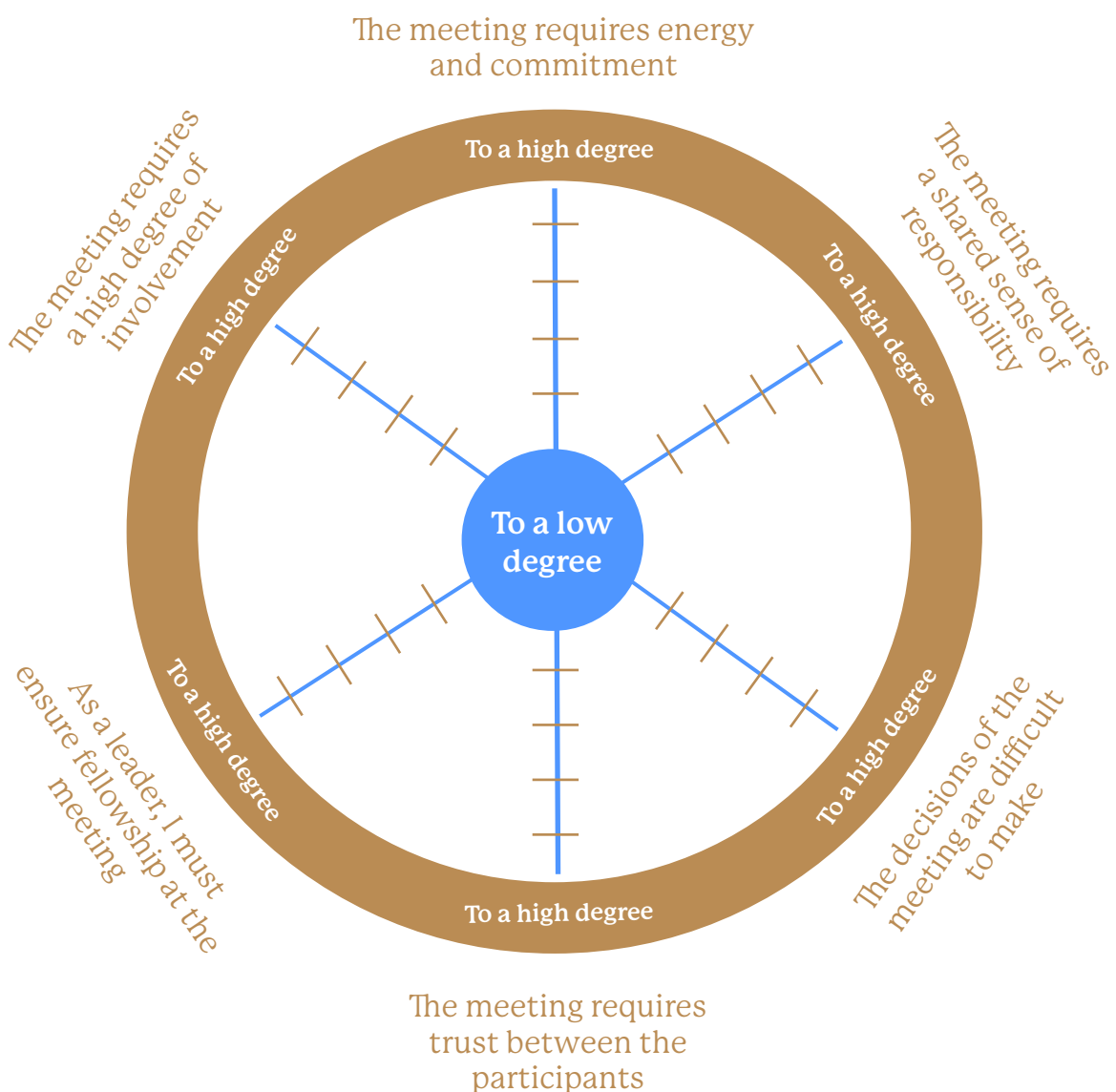


Fig. 2

Source: Strong meeting culture - 3 tips to help you use physical and virtual meetings correctly and effectively. Sille van Loon and Lotte Møller, 2020.



Meeting requires a high level of involvement

If you need to get participants' input or opinions on a subject, or if participants are going to be working together on a topic, developing new ideas or creating something together, they will need to be actively involved.



Meeting requires energy and engagement

This comes into play in meetings where you need to create energy around something you will be doing together, meaning ownership and engagement amongst participants is vital.



Meeting requires a shared sense of responsibility

This concerns the necessity of participants solving a future task as a team and taking ownership of the task or the solution you have developed at the meeting, making them ready to implement the decisions you made as a team.



The meeting's decisions are difficult

This is the case where the complexity of the decisions that need to be made is high or where there is a long way to go before the decision can be reached.



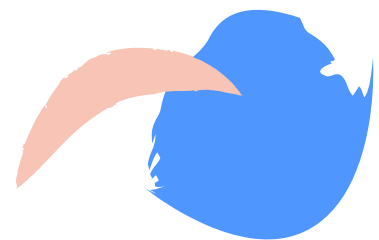
The meeting requires trust

This is the case with those meetings where there is a need for a safe space where people can speak freely and everyone can trust one another.



As manager, I must secure backing from the meeting

These are meetings where there is a need for employees or management colleagues to back you up on an issue, change or decision¹.



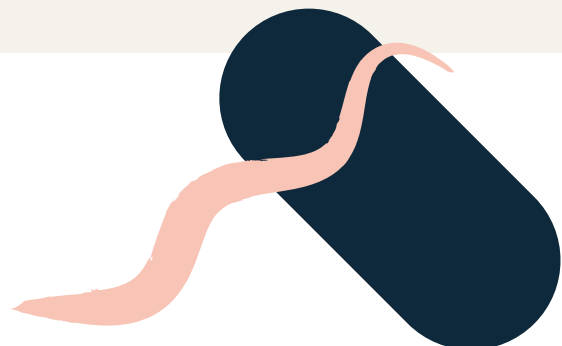
¹ www.goodcompany-cph.dk/s/Styrk_mdekulturen_juni2020.pdf

Many of the parameters we have described often intersect, so that a meeting that requires trust might also face difficult decisions and require involvement and ownership. If your meeting scores highly on several parameters, we recommend holding a physical meeting. This is because a physical meeting affords all participants equal opportunity to have their say, and everyone can decode non-verbal communication. A hybrid meeting or a fully virtual meeting, on the other hand, is a great option for meetings that generally elicit low or average scores across the six parameters. Often, however, we do not have the option of meeting physically even if we might want to or the subject we are meeting to discuss is highly complex. The good news, though, is that it is perfectly possible to hold complex meetings and workshops as hybrid meetings as well. All this requires is thorough preparation and clear facilitation of the meeting or workshop that takes into account the different circumstances under which participants are attending.

Our most important piece of advice, which we will explore in the article, is this:

1. Preparation is key

- Make sure you plan your meeting or workshop thoroughly and be a clear facilitator throughout.
- Think about what process suits your skills as a facilitator and your participants' circumstances.
- Prepare simple, written instructions on all the processes involved.
- Make sure you have physical group spaces that the physical participants can use to take part in the group work across the hybrid set-up. It is not possible to have several online groups in the same room because of the noise from the other groups.
- Design your meeting according to the different circumstances under which your participants are attending.



2. Make sure the tech works

- Everyone should be able to see and hear everyone else.
- All online participants should have their cameras on.
- Everyone should connect using secure internet connections. NB. Sometimes a mobile network works better than WiFi.
- Test how the group room function works if you're not familiar with how to set up, open and close such rooms.

3. Be a clear facilitator and assign roles

- Make expectations clear – what is possible, what is not possible.
- Assign a buddy in the physical room to all online participants if the majority are attending in-person. Make sure to remind virtual participants to 'check in' with their 'buddy' during the meeting.
- Highlight the importance of being inclusive and of everyone having their say.
- Strive for equal participation, mixing up the groups to include both physical and virtual participants.
- Make attending the meeting fun and natural.

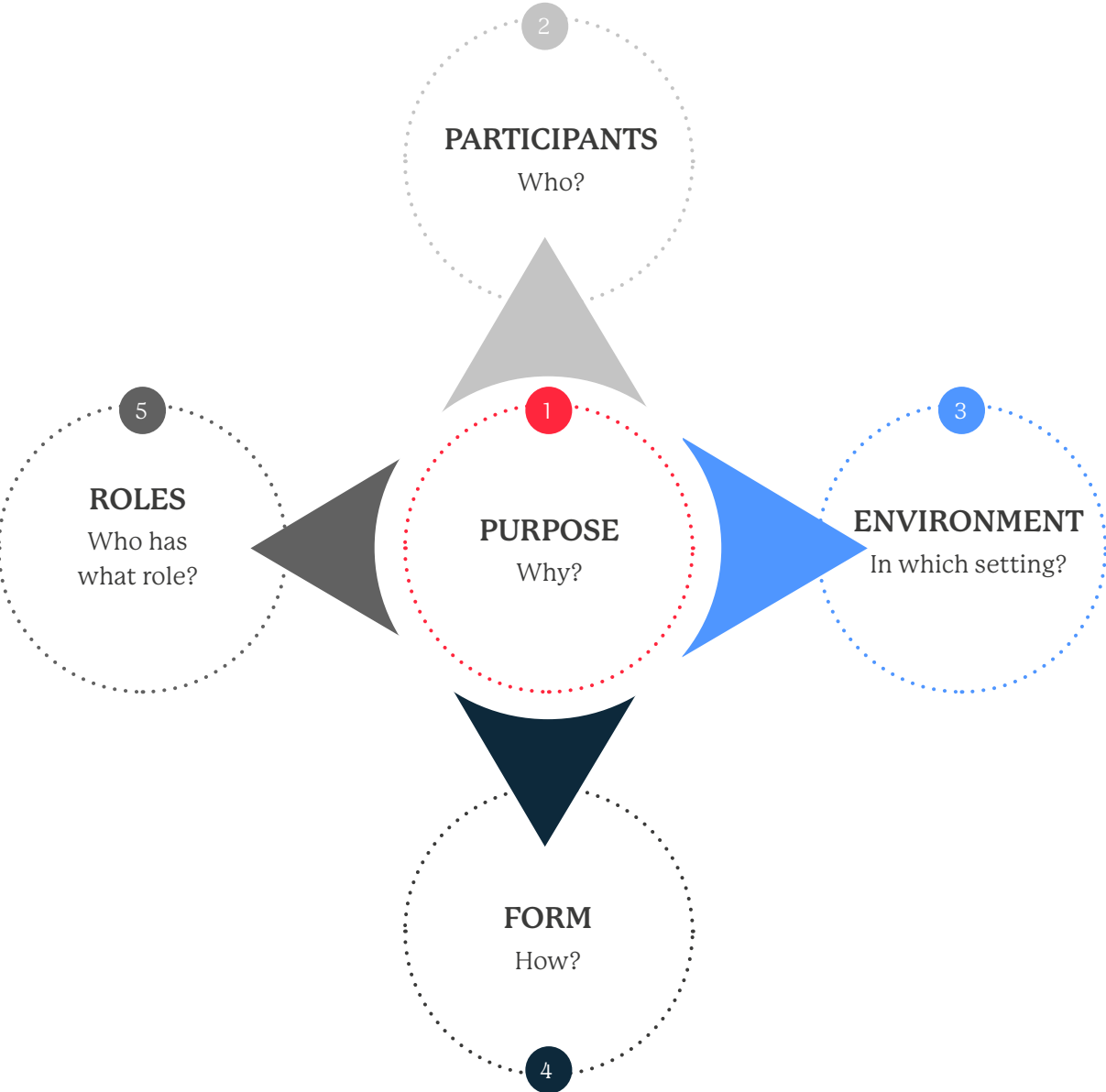
With the right planning, you can easily get the right level of engagement and equal participation from all participants in your hybrid meeting, making it possible to generate results and make decisions that everyone feels ownership over.

Recipe for success

As a facilitator working in a hybrid set-up, it's easy to feel overworked as you need to be able to juggle dialogues taking place in a virtual space and a physical space at the same time. Good preparation can give you peace of mind when it comes to managing anything you foresee happening during meetings or workshops. When we first started running many of our meetings and workshops virtually or

as hybrids, we spent a lot of time preparing them, but now this preparation is no different than if we were holding physical meetings; we just need to consider different aspects. When we are preparing meetings and workshops at Good Company, we take the ‘Design Star’ tool as our starting point. This ‘Star’ has five points: purpose, participants, environment, form and roles.

In the next section, we take a look at each point with a particular focus on design in a hybrid context, and examine a case study as an example of how we have used different methods to create a hybrid workshop that is meaningful for participants and provides value for the organisation in terms of concrete input and a good process.



1. Purpose

The star's first point concerns working to describe the purpose of your hybrid meeting or workshop. A clearly defined purpose will help you focus the rest of your preparation, although you may find the purpose is often a lot more difficult to define than you might think. We recommend making sure that everyone is clear on what the purpose of the meeting or workshop is, and making it very clear at the start of the meeting when you will have achieved what you set out to achieve. Perhaps this amounts to concrete deliverables that need to be finished, or maybe you need to reach agreement on various issues before you have reached your goal. Write down the purpose so that you can use it as a guide for planning the other four points of your meeting.



Case study

In December, we held a workshop for a group of managers who were meeting to agree on how and when they should communicate a new organisational change. The purpose of their workshop was that the management group, comprising a total of 12 managers, should subsequently be united in the method chosen for communicating the organisational changes. It was also important that they became aware of each local challenges in respect of the announcement so that they could help and support each other where necessary. The workshop therefore needed to include a significant amount of **knowledge-sharing** between the managers and at the same time produce **a concrete plan** for how the new organisational changes were going to be announced and what **key messages** should be communicated.

2. Participants

The second point of the star considers your participants. Think about who your participants are and how they are going to contribute to the purpose of the meeting or workshop. Are the participants you were thinking of inviting the right ones to call upon in terms of their decision-making skills and level of knowledge of the subject you will be dealing with? And what internal relationships do they have in terms of breaking up into groups etc? In a hybrid set-up, it is particularly important that you consider – in a purely technical sense – the circumstances

under which your participants will be attending and draw up your plans on that basis. Do all the participants have sufficiently good internet connections for them to be able to use any online tools which you prepare for them? Is there, for example, anyone in the group who is more experienced in using electronic votes or online whiteboards, so other group members will have someone to help out, or will they otherwise need the opportunity to prepare by learning how to work with such whiteboards?



Case study

In our example, the workshop was attended by a 12-person management team, seven managers sitting together in a meeting room in Denmark, two managers in the same room in the UK and three managers logging in from their location in Singapore. It made no difference in terms of our planning that our participants were all in different countries, other than having to take into account the eight-hour time difference between the UK and Singapore. This meant that the time was 8 or 9 in the morning in the UK and Denmark respectively and 4 in the afternoon in Singapore. The UK participants thus had a fairly early morning workshop, whilst the Singapore participants had agreed to take part between 4 pm and 7 pm. Aside from being conscious of the fact that the participants from Singapore had a full day of work behind them by the time the workshop started, our participants might as well have all been in the same city. What's crucial to remember in planning is that some people are physically in the same location while others are joining online.

All participants had good internet connections, they all had access to their computers and smartphones and were used to using them to log in to Teams. However, they all had different levels of experience in terms of using virtual tools such as whiteboards and online votes. We took this into account when putting the groups together, making sure that there was someone in every group who was confident about using the tools and could help the others. Before the meeting, we sent out a short survey to the participants to find out about their experience with online tools.

3. Environment

The environmental point of the star focuses on the setting in which your meeting is taking place and how you can plan this to be most beneficial in supporting the purpose. This is the point of the star under which consideration of our model relating to complexity becomes relevant. Often, we don't have the option of choosing whether our meeting should be physical, virtual or hybrid and have to make a virtue of necessity by making the best use of technical resources in creating a good experience, with all participants feeling they are on an equal footing. This aspect is also about choosing your platform and technical resources.



Case study

In our workshop, we needed a high degree of mutual trust and openness when it came to any challenges the individual managers had in relation to the new reorganisation. Thus bringing them all together in the same physical location would have been ideal, so that they could read each other's body language and take votes in the same space. However, bringing everyone together was not an option owing to travel restrictions, so our design needed to address the need to emphasise that all the participants' contributions were equally important.

During the workshop, the online participants mentioned on more than one occasion how they felt as if they were 'there in the room' because of how well the technical set-up worked. Votes cast by online participants were broadcast in the room via speakers in the ceiling and we had a large, table-microphone that did a great job of picking up people's voices in the physical meeting room in Denmark. Virtual participants were visible on a large screen at the end of the table, while they also enjoyed a good image showing all the participants in the physical meeting room.

To reinforce the sense of being part of a safe environment with face-to-face dialogue, we had planned dividing the group into smaller groups at several points throughout the workshop, mixing up online and physical participants. We therefore booked three extra meeting rooms for our physical participants to make use of, as well as making sure that our two UK-based participants were each able to attend from their own separate rooms. This is an important point that is especially worth noting when it comes to hybrid meetings: participants who are physically sat together should be able to use alternative spaces if mixing them in groups with online participants, and this is often appropriate if you want to facilitate a hybrid dialogue where everyone feels equal.

4. Form

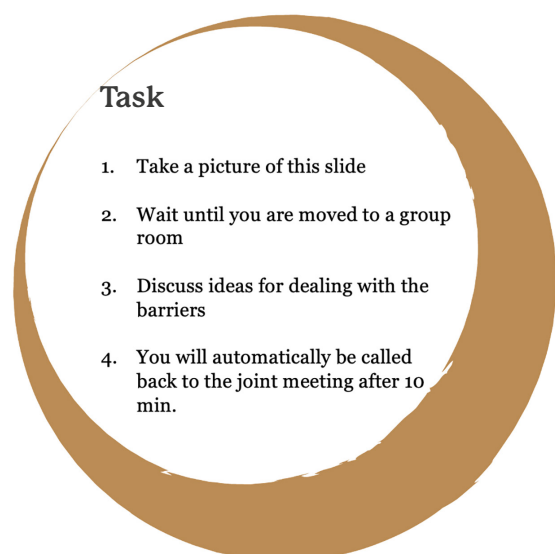
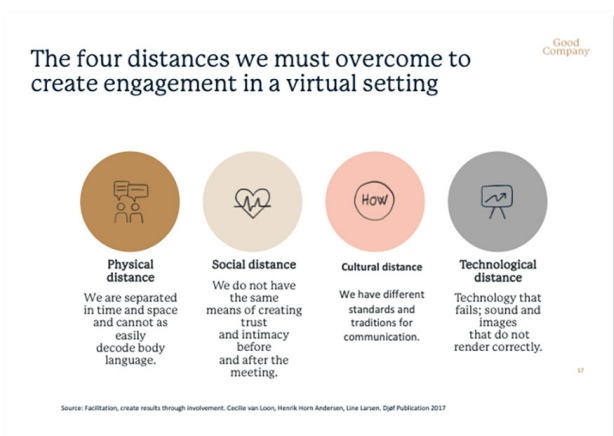
This point is where you should be thinking about what processes and methods for involving participants will support your purpose. Is the primary goal to provide participants with information, or are they to actively address certain issues or even develop something new together?

It is here, under ‘form’, that you start to develop your agenda points into a script, noting down your most important questions, involvement processes and times (see example below). For a hybrid meeting, we recommend making use of far more ‘micro-involvements’ than you normally would in a physical meeting. Micro-involvements are small, brief check-ins with participants where the facilitator asks if everyone is up to speed, for example, asking participants to write in the chat box or raise a virtual hand if they have questions or comments (Read more in the fact box at the end of the section). Micro-involvements ensure that participants actively contribute and can relate to one another. This encourages cohesion between physical and virtual participants. As a facilitator, you should be making it easy to participate in the hybrid meeting in a positive fashion. Make sure you involve participants with frequent questions, virtual votes, check-ins in the chat box, activities for reflection or activities in the virtual group rooms.

We also recommend planning to break people into smaller groups as often as possible, only using plenary dialogue to sum things up. Group dialogues with a maximum of five people in each group allow for a freer, more equal dialogue that does not require a moderator.

Remember to make sure that all the exercises you plan to do are clearly described in writing so that everyone can read them and take them with them into the virtual group rooms. One solution is to prepare all your instructions so that you can

Fig. 3
Example: Break-out meetings: 3. Tech tools.



e-mail them to participants at the start of the meeting or workshop. Another simple option is to ask participants to take a picture with their phones or a screenshot when you are going through the instructions.

One method of involvement that we use a great deal is virtual whiteboards. These are especially useful when participants need to work on something as a team that is going to be presented later in the plenary session. We have good experience of Google Jamboard, Miro and Mural, all of which have free versions and good tutorials you can find with a Google search. One of the advantages of writing on whiteboards is that they can be turned into PDFs after the meeting and sent out to participants as a summary.



Examples of micro-involvements:

- 1.** Create votes using Kahoot or Mentimeter, for example, which participants have to answer before you move on.
- 2.** Get participants to post an emoji in the chat box that shows their energy levels.
- 3.** Ask a question and give participants two minutes to reflect on their answers and post them in the chat box. You don't need to go through all the answers but you can pick out a few and ask people to expand. It is a lot easier to comment on something you have had time to think about rather than just being 'picked out' in a group.
- 4.** Ask a question where you get people to acknowledge with a nod or thumbs up.



Case study

The form of our three-hour managers' workshop was planned to be highly active and co-creative. To facilitate as equal a dialogue as possible, we started by having participants use their own computers or phones to have chats in pairs via Teams. We mixed the participants together so that they sat talking to people outside the plenary session and their first task was to interview one another in terms of the perspectives they had on the organisational changes. Back in the plenary session, they presented each other's perspectives so that participants online were presented by someone in the physical room, and the online attendees presented the perspectives of those physically in attendance. We did this to reinforce the feeling of participation being equal no matter whether you were attending online or physically in the room. We also undertook group work, summarising on virtual whiteboards to which everyone had access on their computers.

5. Roles

This point of the star concerns the roles of the people who are responsible for facilitating the meeting or workshop. In other words, who fulfils which roles during the meeting? Who is responsible for what and when during the course of the programme? Who welcomes participants and sheds light on the importance of them getting together for this workshop? We recommend thinking about whether it is possible to give your virtual participants responsibility for parts of the programme under way so as to emphasise their active contribution. You can also think about giving one of the online participants a special 'energy master' role whose job it is to speak up if it is becoming difficult to follow and to keep energy levels high. We recommend giving this role to someone online because research shows that our ability to focus and maintain energy levels is massively reduced when we participate virtually².

2 *Guide to virtual meetings, 2nd edition (in Danish, original title: Guide til virtuelle møder). May 2021: https://static1.squarespace.com/static/5ca3050d0cf57d4f43c8a5a9/t/60acd2296c78af003750d213/1621938731068/GOODCOMPANY_Article_guide_virtuelle_møder_2021_DK.pdf*

In a hybrid set-up, we also work on giving our virtual participants a buddy in the physical room who pays extra attention to whether their virtual buddy is on an even footing with everyone else at the meeting.

3 roles that are a great idea to assign at the start of a meeting or workshop

1. The Energy Master speaks up when it is time to take a break or introduce an energiser during the meeting or workshop.
2. The Rabbit Master raises the alarm if discussions are getting bogged down in details that are not relevant to all participants or that do not need further discussion right now. In other words, the Rabbit Master should make sure that participants do not tumble down ‘specialist rabbit holes’.
3. The Time Master focuses on the programme sticking to schedule and speaks up when it looks like plenary summations are going to take too long.

By assigning these three roles from the start of the meeting or workshop, you will have helped yourself as facilitator by sharing the responsibility for there being the right level of energy in the meeting and for keeping talks and discussions moving forward. We recommend that facilitators plan in advance who is going to have which role so that it does not become the first discussion on the agenda. It can be beneficial to agree on this with these three people in advance.



Case study

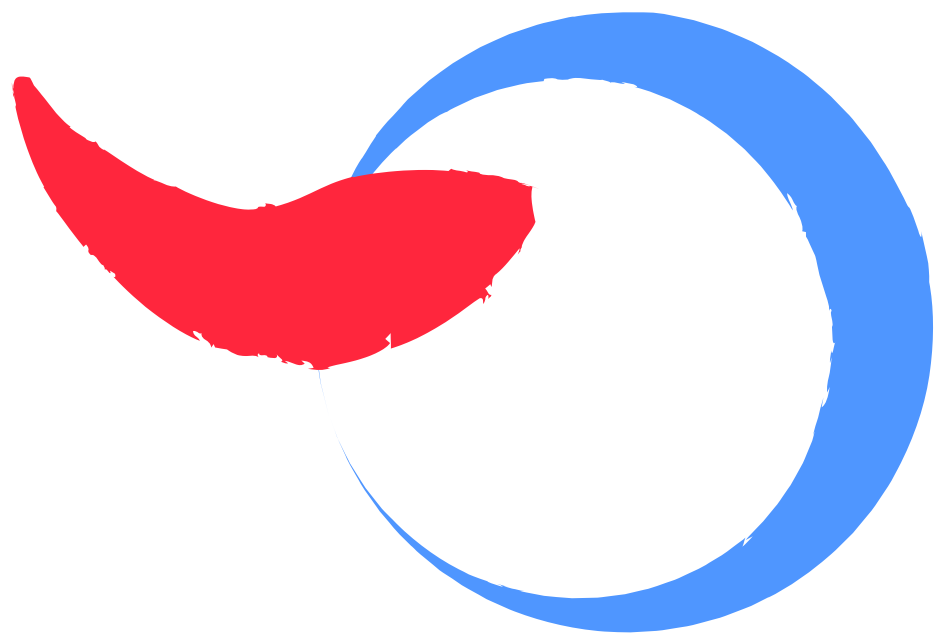
In our example, the facilitator was responsible for all the activities and summaries, whilst the most senior manager started by highlighting the significance of the work they were going to be doing together at the start of the workshop, thereby helping to legitimise and motivate the work. She also assigned roles such as the Time, Rabbit and Energy Masters.

Design your hybrid model to suit your needs

We believe that the future is hybrid in all kinds of ways and that we will continue to get better in this respect as we acclimatise to working across online and physical formats. Hopefully, our examples and good advice can inspire you to try different ways of holding hybrid meetings and will help to allay any concerns you might have. The best way of learning is by doing, so it's about getting started and finding out what suits your needs. Our approach to learning is always to try out new things one at a time. If working with break-out rooms across physical and virtual groups seems overwhelming, put it on the back burner for the time being. Maybe starting to use online votes or virtual whiteboards for the first time feels a bit much, so start with what you feel comfortable with. You can always make your methods more complex along the way. The most important thing with hybrid meetings and workshops is to work towards good, equal participation for everyone. What this will look like will depend wholly on your context.

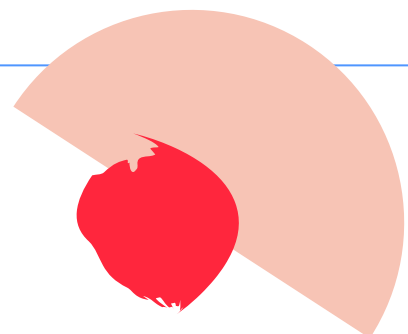
You can find more useful knowledge on hybrid formats in the articles below:

- [Guide to virtual meetings](#)
- [Guide to hybrid management](#)
- [Guide to hybrid working life](#)

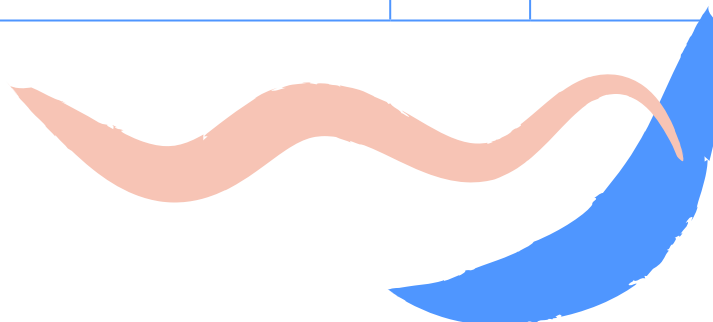


Example script

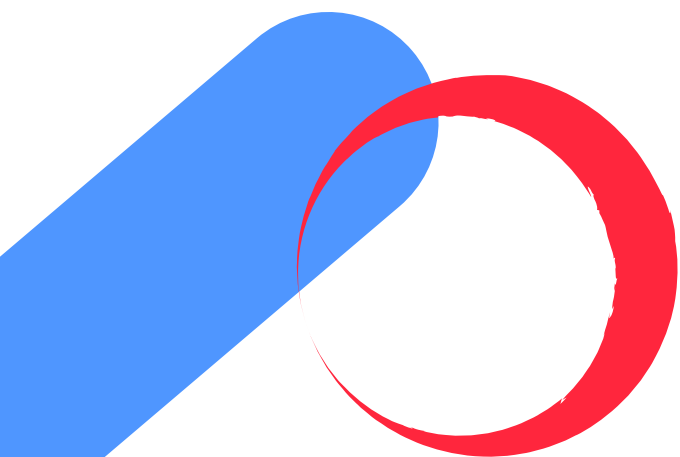
Star point	Description
Purpose	<p>The management group is to spend these three hours sharing knowledge of their local situation with respect to the organisational change and, based on this, agree on when and how they should communicate changes to their employees and the rest of the organisation.</p> <p>The workshop should result in a concrete plan for communication and should define what key messages the management group wants to get over.</p>
Participants	<ol style="list-style-type: none"> 1. Sidse (DK) 2. Claus (DK) 3. Søren (DK) 4. Rasmus (DK) 5. Susanne (DK) 6. Pernille (DK) 7. Line (DK) 8. Vincent (Sin) 9. Eunice (Sin) 10. Melvin (Sin) 11. Philip (UK) 12. Sarah (UK)
Environment	<p>Physical meeting at Tivoli Congress Center for the Danish participants. Three participants at separate locations in Singapore.</p> <p>Two participants in a single location in the UK.</p> <p>There are three meeting rooms which participants can break out into and a plenary room for the group dialogue.</p> <p>The two UK participants each have their own room they can go to.</p>
Form	<p>The workshop should be interactive and engaging, and should include both group work and conversations in pairs that can lead to concrete decisions on what should be communicated when.</p>
Roles	<p>Solveig facilitates and manages the plenary room on Teams.</p> <p>Sidse welcomes participants and highlights the purpose and importance.</p> <p>Balpreet is Energy Master.</p> <p>Rasmus is Rabbit Master.</p> <p>Sarah is Time Master.</p>



Time	Agenda item	How	Who	Materials
BEFORE		<p>Send out the agenda a week in advance, together with a short survey to gauge people's experience with using virtual tools.</p> <p>Agree roles with Sidse.</p> <p>Agree how to should collect and summarise decisions and input.</p> <p>Prepare groups.</p> <p>Prepare whiteboard and Men-timeter questions.</p>	Solveig	
Time	Agenda item	How	Who	Materials
DURING				
10 mins.	Welcome, purpose and programme	<p>Sidse welcomes everyone and goes through the purpose and significance of the work we will be doing.</p> <p>Sidse assigns the three master roles. Time, Energy and Rabbit Master. Buddies are also assigned to online participants.</p> <p>The Buddies are:</p> <ol style="list-style-type: none"> 1. Sidse and Sarah 2. Claus and Philip 3. Søren and Eunice 4. Rasmus and Vincent 5. Solveig and Melvin <p>Solveig goes through the programme.</p>	Sidse and Solveig	Slides with programme and purpose.
5 mins	Expectations	<p>2 mins for silent reflection.</p> <p>Write what you ideally want to get out of today's workshop on Mentimeter.</p>	Solveig	Slide with Mentimeter link.



Time	Agenda item	How	Who	Materials
20 mins	<p>Dialogue in pairs on Teams.</p> <p>What should we be aware of when announcing these changes?</p>	<p>Spend ten minutes interviewing one another on your individual situations.</p> <p>Begin by thinking about:</p> <ul style="list-style-type: none"> • Which parts will be new knowledge for your teams? • How do you expect your teams to react to this new knowledge? • Are there any special focus areas where you are? <p>You should present your partner's most important perspectives in the plenary session.</p> <p>Groups:</p> <ol style="list-style-type: none"> 1. Sidse and Sarah 2. Claus and Philip 3. Søren and Eunice 4. Rasmus and Vincent 5. Susanne and Melvin 6. Pernille and Line 	Everyone	Instructions on slide with groups.
25 mins	Presenting in plenary session	Present each other's perspectives in the plenary session.	Everyone Solveig summarises on Miro-board.	Have Miro-board ready.
10 mins	Break	Check in with buddy.		



Time	Agenda item	How	Who	Materials
60 mins	Key messages and how to best announce them?	<p>30 mins.</p> <p>In groups of threes – How should we communicate?</p> <p>On the basis of the interviews, discuss what you think is most important to focus on when announcing the organisational changes.</p> <p>Use the template and write down three main points on Mentimeter.</p> <p>Groups:</p> <ol style="list-style-type: none"> 1. Sidse, Line and Vincent 2. Sarah, Claus and Pernille 3. Philip, Eunice and Susanne 4. Søren, Rasmus and Melvin <p>24 mins</p> <p>Presentation in plenary session.</p> <p>4 groups, six minutes each.</p> <p>6 minutes for summing up.</p>	Solveig	<p>Slides with instructions and link to Miro-board in chat.</p> <p>4 break-out rooms on Teams.</p> <p>Template with ‘what, why and how’ for each key message.</p>
10 mins	Break	<p>Solveig sorts and categorises input from groups.</p> <p>Remember to check in with buddy.</p>		
25 mins	Summary	<p>In plenary session.</p> <p>Share the Miro-board on the screen and go through the input and suggestions for the plan.</p> <p>Name who is responsible for the different activities.</p>	Solveig	The Miro-board
5 mins	Next steps	Thanks and next steps.	Sidse and Solveig	

Time	Agenda item	How	Who	Materials
AFTER-WARDS	Summary	<p>Send out Miro-board as PDF.</p> <p>Create a communication plan with who is responsible for what so that it is clear to everyone who will communicate what, when and how.</p>	Solveig	

Sources:

1. <https://hbr.org/2021/06/what-it-takes-to-run-a-great-hybrid-meeting>
2. <https://www.mckinsey.com/business-functions/organization/our-insights/what-executives-are-saying-about-the-future-of-hybrid-work#>
3. <https://hbr.org/2021/05/how-to-do-hybrid-right>
4. https://www.goodcompany-cph.dk/s/Styrk_mdekulturen_juni2020.pdf
5. https://ms-worklab.azureedge.net/files/reports/hybridWork/pdf/2021_Microsoft_WTI_Report_March.pdf (The 2021 World Trend Index)
6. Facilitation - creating results through involvement by Cecilie van Loon, Henrik Horn Andersen and Line Larsen
7. https://static1.squarespace.com/static/5ca3050d0cf57d4fc8a5a9/t/60acd_2296c78af003750d213/1621938731068/GOODCOMPANY_Article_guide_virtuelle_moder_2021_DK.pdf

