

What It Takes to Run a Great Hybrid Meeting

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A [recent McKinsey survey](#) suggests that 90% of organizations will adopt some combination of remote and on-site work as they emerge from Covid restrictions. This new model will bring with it a dramatic change in how we meet — a hybrid mix of in-person attendees and remote meeting participants seems an inevitable component of our “new normal.”

There’s simply no going back to the world of “squawk boxes” on the conference room table, with those on the phone straining to hear, being “talked over” when trying to speak, or guessing what’s on that PowerPoint slide on a screen only their colleagues in the room can see.

As Satya Nadella, Microsoft’s CEO recently put it, “We want to ensure those joining remotely are always first-class participants.”

But hybrid meetings are vastly more complex than meeting in-person or virtually. They are easy to do poorly and hard to do well — remote participants are only one slip-up away from losing that first-class status. Just as executives learned how to run [great virtual meetings](#) over this past year, they now need to learn how to conduct great hybrid meetings as well.

Drawing from our combined half-century of experience designing and facilitating meetings for executive teams and boards, we’ve assembled eight best practices to help make your hybrid meetings more effective:

1. Up your audio game.

While remote participants need to see who is talking and what’s taking place in the meeting room, great audio is actually more critical. Yet while a lot of attention is paid to the visual aspects of meetings, audio is often overlooked until the last minute. Pre-Covid, we often heard remote participants say, “I’m sorry, can you get a little closer to the speakerphone and repeat what you just said?” Now, they expect to hear everything clearly — just as they can on Zoom.

To avoid a last-minute scramble caused by poor audio, make sure the room is equipped with enough high-quality microphones so remote participants can hear. If you’re in a hotel

or other temporary meeting space and multiple microphones aren't a viable option, consider supplementing your audio input by having in-person attendees pass around a hand-held microphone before speaking.

2. Explore a technology boost.

The pandemic accelerated the use and evolution of videoconference technology to enable virtual meetings from PCs, tablets, and phones. As providers invest heavily to better enable hybrid meetings, new features are being introduced to improve face-to-face communication among in-person and remote attendees.

For example, Zoom's [Smart Gallery](#) (targeted for completion this year) uses artificial intelligence to detect individual faces in a shared room and pull them into panes on the screen so remote participants can see them in the now-familiar gallery view. Microsoft is developing [new types of meeting rooms](#) optimized for the hybrid experience. You should investigate what technology upgrades might be accessible to help make your team's experience more immersive and authentic.

3. Consider video from the remote participant perspective.

As you design the meeting, continually ask yourself: What do remote participants need to see in order to fully engage? They should be able to see the faces of in-room attendees, shared presentations, physical documents handed out, content created during the meeting on whiteboards or flipcharts, etc.

It is tempting to just ask the in-person attendees to open their laptops and join a Zoom meeting (on mute), so remote participants can see everyone's faces and documents can be easily shared. Clients frequently suggest this type of "in-room virtual meeting." However, if the folks gathering in the room spend the meeting on their computers, they might as well have stayed in their homes or offices. The people meeting in person are — at least for the moment — so thrilled to finally be together again the last thing you want is for them to crouch over their individual laptops all day for the sake of the remote participants.

Especially in cases where cutting edge video technology is unaffordable or unavailable, a little ingenuity can go a long way to create a high-quality video experience for everyone.

For example, for a two-day offsite at a Florida hotel with 10 in-person attendees and two remote participants (one in Zurich and one in LA), we attached three webcams to laptops, and used a fourth laptop to share what was on the main screen (usually a PowerPoint). We mounted two of the webcams on tripods, which faced the in-room attendees so remote participants could see who was speaking. We moved the third camera around to show a close-up view of presenters, flip charts, and wall charts throughout the session as needed. The four laptops joined the two used by our two remote executives for a total of six separate Zoom “participants” in the single Zoom meeting.

Post-meeting feedback confirmed that this setup allowed the remote participants to feel like they were an integral part of the meeting rather than distant observers.

4. Make remote participants full sized.

Another way to give remote participants equal stature is to give them greater presence in the room. In addition to the main screen in the center, set up two additional large monitors — one on each side of the room — showing “life-size” panes of the remote participants for the duration of the meeting.

We find these large images help in-person attendees accept remote colleagues as full participants and provide a constant reminder to include them in the conversation. Similarly, if possible the voices of remote participants should emanate from the same monitors as their faces — ceiling speakers tend to reinforce the artificiality of the situation.

5. Test the technology in advance.

Nothing kills a meeting’s momentum like waiting to fix a glitch in the audio or video. Prior to an important meeting, test the audio-visual set up — both in-room and for the remote attendees. Schedule a 10-15 minute one-on-one dry run to get remote participants comfortable with what they will see and hear during the meeting, as well as

to review any software features they'll likely be asked to use. It's well worth the brief time required.

6. Design meetings for all attendees.

Review each activity or exercise focusing specifically on how remote participants will engage. Consider what tools and techniques, digital or otherwise, can be used to maximize their interaction with the in-room attendees.

For example, if you need to poll the group, use a phone-based survey tool like [Poll Everywhere](#) to collect everyone's input in real time. This puts remote participants on an equal footing, versus a show-of-hands or relying on verbal feedback. To capture meeting notes, use an online whiteboard (or focus a remote camera on a flip chart) so everyone can see what's being written as it happens.

Similarly, if the meeting design calls for in-room attendees to put dots or post-its on a wall chart, use a webcam to allow remote participants to read their peers' responses before placing their own, just as they could if they were physically present.

If the meeting design calls for putting people into breakout groups, the easiest solution is to include all the remote participants in a single group. While simpler, this sends them the wrong message by reinforcing their physical absence. It's likely worth the extra logistical and technical effort to integrate remote participants across several breakout groups to accentuate their equal status.

7. Provide strong facilitation.

Managing a hybrid meeting is harder than when the whole group is in person or on Zoom together. One person — a staff member, an outsider or a meeting participant — should be assigned to guide the conversation and keep it on track.

Despite the effort you may put into meeting design and logistics, it remains far too easy for in-person attendees to dominate the discussion. A facilitator should draw the remote

participants in, keep them engaged and ensure their voices are heard, not interrupted or talked over. At times, the facilitator may need to call on in-room or remote participants to ensure that all voices are heard.

8. Give each remote participant an in-room “avatar.”

There may be times when remote participants need a physical presence in the room. It could be as simple as a camera view being blocked. Maybe a microphone isn't working, or an attendee needs to be reminded to speak up. A post-it may need placement on a wall chart, or a poker chip placed on a table as part of a resource allocation exercise.

For these situations, each remote participant should have what we call an “in-room avatar” — a staff person (or fellow participant) who can be their physical presence in the meeting room as required. Whether via text, chat, or phone, they have a private line of communication constantly available throughout the meeting. Remote participants tell us that having confidential access to a single point-of-contact goes a long way to removing a sense of isolation or distance from those in the room itself. How embarrassing is having a remote participant asking “Fred, can you please speak up. I can't hear you” every time Fred speaks? How much better to have another person come up to Fred during a break and discretely remind him “Fred. Please speak louder. It's really hard for Natasha to hear you from Zurich.”

As the pandemic eases and we resume gathering in person, hybrid meetings will become a permanent part of how organizations function. These meetings bring added complexity at the same time that our collective Covid-driven year of meeting virtually raised expectations for remote participation. Fortunately, by leveraging technology and tools, being thoughtful in meeting design, and providing strong facilitation we can create hybrid meetings where all participants — whether in the room or an ocean away — feel engaged, valued and equal.