

Conducting Successful Hybrid Meetings

Slide	Facilitator	Producer	Duration	Time
Conducting Successful Hybrid Meetings	<p><b>Do</b></p> <p>Welcome participants to the class and introduce yourself to the participants</p> <p>Inform participants that the session is being recorded</p> <p>Inform participants that they are on mute and to unmute when speaking</p>	<p>Mute participants</p> <p>Wait for facilitator's ok to permit entry from wait room</p> <p>Start recording</p>	2 min	
Objectives	[Read objectives from slide]	Continue permitting late participant entry from wait room	2 min	
What is a hybrid meeting?	<p><b>Ask</b></p> <ul style="list-style-type: none"> <li>What is a hybrid meeting?</li> </ul> <p><b>Key points</b></p> <ul style="list-style-type: none"> <li>A hybrid meeting occurs when all attendees are not co-located in the same location at the same time</li> <li>A hybrid meeting is characterized by mixed participation where some attendees participate in-office while other attendees participate virtually</li> <li>A hybrid meeting differs from an in-office meeting where all attendees join the meeting in-person in an office or a conference room</li> <li>A hybrid meeting differs from a virtual meeting where all attendees appear on a laptop screen or monitor</li> <li>More information about virtual meetings can be found in the Virtual Meetings Best Practices job aid [not yet available].</li> </ul>		5 min	
The hybrid meeting process	<p><b>Key points</b></p> <ul style="list-style-type: none"> <li>Now, I'll explain why hybrid meetings are more likely to be successful if you follow a <i>process</i></li> </ul>		<1 min	

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Why follow a meeting process?	<p><b>Key points</b></p> <ul style="list-style-type: none"> <li>• A process helps the organizer set the parameters for the meeting: what, when, where, and how</li> <li>• A process helps the organizer to set expectations for the meeting’s objectives, participation, and outcomes</li> </ul> <p><b>Ask</b></p> <ul style="list-style-type: none"> <li>• Not all types of hybrid meetings benefit from following a formal process</li> </ul> <p>What types of meetings do you think would benefit from a formal process?</p> <p>Possible answers:</p> <ul style="list-style-type: none"> <li>○ Brainstorming meetings</li> <li>○ Planning meetings</li> <li>○ Kick-off meetings</li> <li>○ Retrospective or post-mortem meetings</li> <li>○ Decision-making or problem-solving meetings</li> </ul>	Use whiteboard feature to capture learner input	10 min	
Elements of a hybrid meeting process	A hybrid meeting process consists of three elements: preparing, conducting, and following-up		1 min	

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<p>Preparing for the hybrid meeting</p>	<p><b>Key points</b></p> <p>The best run hybrid meetings require additional time for planning and preparation</p> <ul style="list-style-type: none"> <li>• Clarify the objective of the meeting. For example, is the meeting objective to brainstorm, report status, announce, or decision-making?</li> <li>• Select attendees, identifying who needs to attend and who doesn't. Who will attend in-office and who will attend virtually?</li> <li>• If necessary, assign roles to meeting attendees. For example, note-taker, timekeeper, presenter, contributor</li> <li>• Before the meeting takes place, solicit input on the agenda, then post the agenda in the meeting invitation</li> <li>• Keep the meeting as short as possible. For example, if the agenda items account for only 15 minutes, then schedule a 15-minute meeting</li> </ul> <p><b>Ask</b></p> <p>What are the characteristics of a good hybrid meeting agenda?</p> <p><b>Do</b></p> <p>Reference the <a href="#">Accountability Matrix</a> handout available from the Info Page</p>		10 min	
<p>Conducting the hybrid meeting (1 of 3)</p>	<p><b>Key points</b></p> <ul style="list-style-type: none"> <li>• Test the audio-visual set up (for your laptop and/or the conference room).</li> <li>• In Teams, adjust the settings according to your preferences, as needed. Muting, captions on or off, etc.</li> </ul>		2 min	

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	<ul style="list-style-type: none"> <li>• Establish the meeting ground rules. It's important to outline rules of engagement. For example, request that attendees turn on their camera and ask in-person attendees to eliminate side conversations</li> </ul> <p><b>Ask</b></p> <p>What are other examples of important ground rules for hybrid meetings?</p> <ul style="list-style-type: none"> <li>○ Mute microphone unless speaking</li> <li>○ Use the Raise Hand feature to ask permission to speak while someone else is speaking or presenting</li> </ul> <ul style="list-style-type: none"> <li>• Inform attendees if you plan to record the meeting</li> </ul>			
<p>Conducting the hybrid meeting (2 of 3)</p>	<ul style="list-style-type: none"> <li>• As the leader of the meeting, if located in a conference room, also connect to the meeting via Teams from your laptop               <ul style="list-style-type: none"> <li>○ This enables remote attendees to get your attention without interrupting someone who's speaking in the room</li> </ul> </li> <li>• Consider conducting a short icebreaker to lighten the mood of the meeting</li> <li>• Call on attendees. Be sure to solicit input from remote attendees as often as you solicit input from attendees in the room</li> </ul>		2 min	
<p>Conducting the hybrid meeting (3 of 3)</p>	<ul style="list-style-type: none"> <li>• Ensure that you leave time at the end of the meeting for addressing next steps and specifying action items</li> <li>• Ask attendees for feedback about the meeting, what worked, what didn't work, suggestions</li> <li>• If the meeting is recurring, consider establishing an initial agenda for the next meeting</li> </ul>		2 min	

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Following up on the hybrid meeting	<ul style="list-style-type: none"> <li>• Ensure that you follow-up with attendees on action items and assigned tasks. Use the same method for follow-up with all attendees, regardless of location</li> <li>• Post the meeting notes in a shared area where all attendees can access them                             <ul style="list-style-type: none"> <li>○ If recorded, post the recording in a shared area where all attendees can access it</li> </ul> </li> <li>• A meeting process that includes an evaluation is more likely to be successful. This may be a formal survey or an informal check-in. What's working? What's not working? What changes/improvements do attendees recommend?</li> </ul>		5 min	
Microsoft Teams features for hybrid meetings	<p><b>Key points</b></p> <p>Microsoft Teams provides several features that can enhance hybrid meetings. These include:</p> <ul style="list-style-type: none"> <li>• Spotlight</li> <li>• Meeting Notes</li> <li>• Whiteboard</li> <li>• Together Mode</li> </ul>		<1 min	
Spotlight	<p>Spotlight enables you to put the focus on a single participant</p> <p>Only meeting organizers and presenters can assign the spotlight</p>	<a href="#">Video link</a>	2 min	
Meeting Notes	<p>Teams Meeting Notes is fully integrated into the application and it provides note-takers with an easy way to capture notes for most types of meetings</p>	<a href="#">Video link</a>	2 min	
Whiteboard	<p>Microsoft Whiteboard is fully integrated into Teams, which enables you to brainstorm ideas, collaborate visually, and to save to the cloud and resume later</p>	<a href="#">Video link</a>	2 min	

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Together Mode	<p>The biggest benefit of Together Mode is being able to see all the virtual attendees of the meeting together, which research shows makes meetings on Teams more engaging and less fatiguing</p> <p>Some limitations:</p> <ul style="list-style-type: none"> <li>You need at least 5 participants to activate Together mode.</li> <li>Only 49 users are supported</li> <li>You must be a meeting host to activate Together mode.</li> </ul>	<a href="#">Video link</a>	2 min	
Polls	<p>Polls are a way to get a quick read of the room on a specific topic. You'll need to set up the poll in advance of the meeting</p>	[There is no video for polls]	2 min	
Breakout rooms	<p>Breakout rooms enable you to divide attendees into subgroups for some reason</p> <p>Do</p> <p>Reference the <a href="#">Seven Teams Features for Meetings</a> handout available on the Info Page</p>		2 min	
Are There Alternatives to Hybrid Meetings	<p>Now let's consider some alternatives to hybrid meetings</p>		1 min	

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<p>Alternatives to Hybrid Meetings</p>	<ul style="list-style-type: none"> <li>• Firstly, is the meeting necessary? Can some agenda items be performed offline instead?                             <ul style="list-style-type: none"> <li>○ Frequent meetings strip remote work of one of its greatest advantages—flexibility. Can you do more work asynchronously?</li> <li>○ Perhaps you can use status reports in place of status meetings, do brainstorming or post announcements in a chat thread, or substitute one-on-one meetings with informal chats</li> </ul> </li> <li>• Does it need to be hybrid? Consider an all in-office or all virtual meeting instead                             <ul style="list-style-type: none"> <li>○ If most attendees will appear on-screen, then consider conducting a virtual meeting instead</li> </ul> </li> </ul>		<p>2 min</p>	
<p>Final thoughts?</p>	<p>Use whatever time remains for final thoughts and provide contact information for post-session follow-up.</p>		<p>5 min</p>	