



Hybrid meetings

What have we learned?



Have you thought about a hybrid?

No, we're not talking about changing your car – we're looking at hybrid meetings, particularly how you can run these effectively, based on lessons learned from our experience so far.

What is a hybrid meeting?

A meeting where there is a combination of in-person and virtual participants.

Rethinking the hybrid meeting

Hybrid meetings are not new. We have all dialled into meetings on a "voice-only" basis. However, with improved technology and more widespread use, the ability to communicate and contribute to meetings remotely has improved. Hybrid meetings, with multiple virtual participants, are a viable alternative to all in-person or all-virtual meetings - but only if conducted properly.

Are all participants present?

The main challenge of hybrid meetings is what has become known as 'presence disparity' between virtual and in-person participants. For hybrid meetings to be effective, we need to ensure equal participation and engagement from virtual participants – requiring effective meeting management and chairing. We set out some advice on achieving effective hybrid meetings and how this might differ by format.

Hybrid meetings

TOP TIPS:

Effective hybrid meetings begin before they have even started

Making the best of hybrid meetings means planning in advance:

- Ideally share content in advance so screens can mostly be used for faces.
- Communicate to participants how the meeting will work in advance (i.e. the plan for technology, video, audio). Also include this in the invite and reiterate key points at the start of the meeting.
- Think about the agenda in advance and what might be required in terms of facilities to communicate with the whole group.
- Consider the purpose of the meeting upfront and what's on your business plan, then vary the meeting format to suit the planned content.
- Consider time-zones when setting meetings if participants are joining from different locations.
- Consider the order of agenda items where you have participants hopping on and off the call and if there is to be a "closed" session.
- Allow for meaningful breaks where the meeting is expected to last more than a couple of hours (timings often get squeezed).
- Consider if the meeting format should change if participants numbers move beyond a typical meeting size to a seminar-sized audience.

Participation

With a mix of in-person and remote participants, it is important to put virtual participants on an equal footing.

Visual presence

Give remote participants a visual presence in the room (so they're not forgotten).

Faces

Make sure remote participants can see faces and not just a table with in-person participants too small to make out.

Microphone

Have each participant use their own laptop/tablet camera, but with a central microphone, to enhance engagement.

Distractions

Encourage those who aren't in-person to close emails and other distractions to avoid 'second screen syndrome'.

Laptops

When using laptops, we recommend all participants close chats and other apps in the background.

TOP TIPS:

Focus on the experience of virtual participants to ensure equal participation.

Visual engagement and audio quality will vary depending on each participant's set-up.

Individual, close-range cameras, alongside a common audio input (i.e. a conference phone) within a boardroom can ensure an equal experience. Commercial technological solutions with 360° cameras are also now available as a very effective alternative.

Unless the format of the meeting is specifically a seminar, live presenters should consider presenting via laptops rather than standing up.



Boardroom 1



Boardroom 2



Participant A



Participant A



Boardroom 1



Participant B



Participant C



Participant D



Engagement

Setting up the meeting is important. Equally vital, however, is ensuring continued engagement once the meeting has begun.

Social chair

In-person participants may dominate so, as well a 'content chair', consider having a 'social chair' who can focus on engagement.

Make introductions

Make introductions or remind everyone who is on video at the start of meetings to spotlight remote participants.

Solicit views

Go round the room/screen to solicit views. Avoid using generic phrases like "does anyone online have any comments?" Instead, start with those attending virtually and perhaps ask by name.

Asking questions

Would a Q&A chat work better? A 'hands up' function? Use of voting tools?

Signpost content

Remember to signpost content: What page are you on? Flag key aspects of graphs. This is particularly important for virtual participants.

Actively get feedback at the end of the meeting to ensure the format is working. Ensure 'feedback' is scheduled as an AOB agenda item.



TOP TIPS: Check the tech

Hybrid meetings rely on smooth-running technology to ensure engagement.

- Test the tech! Is the Wi-Fi sufficient? Are cameras, screens and microphones working? Join early to check IT is working and help any early joiners with technical issues or offer a pre-call to check everything works.
- Ensure all participants can hear you, avoiding side conversations or issues with technology such as “echoes” or intermittent sound.
- Utilise the ‘mute’ function when not speaking and encourage other participants to do the same to avoid feedback.
- Replace flipcharts with virtual drawing tools (Ensure you have a suitable drawing device set up in advance).
- Use split screen to show virtual participants and the meeting papers on one screen.
- Use an Ethernet cable where possible to ensure a stable connection or position laptops close to your Wi-Fi router.
- If at home, make sure you, or others in your household, are not streaming or downloading large files while on video calls as this can interrupt the connection.
- Consider what is your back-up plan if the planned technology doesn’t function (e.g. dial-in options, running a separate session).



Consider your meeting format

The type of meeting affects the importance of the key characteristics of hybrid meetings. Below we set out key considerations for three different meeting types.

Informal

Formal

Seminar

How does participation vary?

Be flexible and allow people to go off camera if it suits their personal circumstance (but with a preference for cameras on where possible).

Would a fully virtual meeting be equally productive?

You may not always have control over the meeting approach. Try to influence the format to suit the content, but also plan your content (and tech) for the format that's agreed.

More likely that you will have to ensure virtual participants are included when presenting.

If the meeting format is unfamiliar, planning in advance will avoid pressures on the day.

Less dialogue and more presenting format. Therefore focus the videos on those presenting so all participants can see them.

Do the virtual participants need to see the room?

Try to keep background chat to a minimum.

How does engagement change?

Social chairs become more important where there is a an individual or group likely to dominate proceedings.

If meetings are regular, should you vary the format to keep fresh? (Needs to still be based on the agenda.)

Work with other participants to identify the balance of meetings.

If you are the (or a) virtual participant, use more interactive tools to keep participants engaged, pause regularly for questions.

Seminars often have presentations with Q&A, so it is important to facilitate participation e.g. through an online chat or tools to help poll the audience.

Ensure good in-room microphones to avoid the need for shouting (especially during Q&A so everyone can hear the questions).

Is different tech required?

Consistency of tech allows you to ensure consistency of experience.

Consider whether virtual participants are using their screens to view presentation materials and whether they'll need an alternative option to view participants?

Do you need to ask in-room participants to bring a device?

TOP TIPS:

Hybrid works for:

- Provision of information with the opportunity for questions and answers.
- General updates (e.g. progress status, reviewing actions, information exchange).
- Team catch-ups / quick decision-making.
- When travel to in-person meetings is inefficient.

When it doesn't work as well:

- Detailed discussions, debates or in-depth collaboration.
- Creative or idea-generation meetings.
- Long, detailed meetings with multi-media.

Be discerning about whether a hybrid meeting is appropriate. Encourage a change if necessary.



Please contact your Barnett Waddingham consultant if you would like to discuss any of the above topics in more detail. Alternatively get in touch via the following:

✉ info@barnett-waddingham.co.uk

☎ 0333 11 11 222

www.barnett-waddingham.co.uk

Barnett Waddingham LLP is a body corporate with members to whom we refer as "partners". A list of members can be inspected at the registered office. Barnett Waddingham LLP (OC307678), BW SIPP LLP (OC322417), and Barnett Waddingham Actuaries and Consultants Limited (06498431) are registered in England and Wales with their registered office at 2 London Wall Place, London, EC2Y 5AU. Barnett Waddingham LLP is authorised and regulated by the Financial Conduct Authority. BW SIPP LLP is authorised and regulated by the Financial Conduct Authority.