

Hybrid Meetings: What, When, & How

A Guide to Post-Pandemic Meetings & Collaboration

The meeting: the fundamental unit of human collaboration. People do not collaborate in isolation and, while much of popular business culture has lambasted the meeting, when done well it remains the most effective form of planning and coordinating collective work. As the world began shutting down in early 2020, team leaders, meeting planners, and facilitators found themselves contemplating a grim prospect -- all meetings all online all the time.

This prospect turned out not so grim after all. People quickly figured out how to make best use of the relatively new virtual meeting platforms to effectively meet and get work done. But now, as the pandemic hopefully ebbs and we begin eyeing the prospect of an uneven opening, where some of us can travel and meet but not all of us, people have begun contemplating the “hybrid meeting”, with some people in the room and some people beamed in via a virtual platform. But how would this actually work in practice? Even if you can get the technology to all work, will it result in a successful meeting and collaboration? And what’s the ideal mix of people in and out of the room?

To answer these questions, we’ve adapted a framework for organizing “hybrid work” first proposed by Lynda Gratton in [a recent Harvard Business Review article](#). Rather than asking questions like, “how many people can be in the room vs. online,” instead ask, “what do you and your participants want to accomplish,” and then design the meeting around that. In addition, consider two main dimensions: time and place. As illustrated in Figure 1, some things can take place “anytime and anywhere” while others have to take place “in the same place at the same time” with several combinations in between. Using this framework, start by thinking about the meeting, not as a single event, but as a series of smaller events designed to accomplish your outcomes. Some of these events might take place online, some in person, some synchronous, some asynchronous.



Figure 1: The role of time and place in human interaction.

With this mindset now firmly in place, follow a five-step process:

1. What workflows and meeting exercises will best deliver your intended outcomes? Start with the end in mind -- your outcomes -- and break the meeting into pieces with specific activities that will deliver them. Use the framework in Figure 1 to determine which activities to do when and where.
2. To accelerate collaboration, build empathy. Good [meetings promote collaboration when they trigger the “social chemicals”](#) of endorphins (the “runners high” released through overcoming common struggles), dopamine (the “checklist chemical” released by achieving common goals), serotonin (the “pride chemical” released through public celebration and recognition), and oxytocin (the “trust chemical” released most often through human touch). Some, but not all of these chemicals can be released online, with oxytocin being the hardest to generate online.
3. Factor in diversity, equity, and inclusion in how you design the meeting, especially in the case of an “uneven” reopening as the pandemic ebbs. If not everyone can travel and be in-person or conversely if not everyone has high quality broadband, you may undermine your efforts to build empathy and collaboration by making people feel excluded.
4. Consider post-meeting projects and work flows. The meeting is never an end in itself. How will you create and maintain momentum and ensure decisions made during the meeting come to fruition? Plan specific follow up and follow through activities. Example: a meeting cadence of regular check-ins or specific due dates for completing work started during the meeting.
5. Ensure fairness and transparency. The more consequential the meeting -- the more it will impact people’s lives or livelihoods -- the more important it is for people to feel that the decisions made

followed a clear and transparent process. People will accept an outcome, even if unfavorable to them, if they feel the *process* was clear and fair. To accomplish this, give everyone the same access to the meeting (see example below) or, if you have to make choices about who can attend and how they can attend, make sure everyone understands the decision-making process.

Let’s work through an example. Imagine your organization needs to hold its annual strategic planning meeting. Pre-pandemic, you might have flown people in from across the world, put them in a conference room, and taken them through a series of presentations, get-to-know-you exercises, working groups to flesh out parts of the plan, and other activities to arrive at consensus around the strategy. Breaking those down into specific outcomes they might include:

- An agreed upon fact-set about the challenges and opportunities facing the organization
- Consensus and agreement on the annual strategy
- Camaraderie among the senior leadership team

One lesson we learned from the pandemic is that we can make much better use of people’s time. In some ways, because the audience was captive, all in-person meetings were somewhat lazy and misused time. Using the framework in Figure 1 we can plot out how to achieve each outcome by optimizing the use of time and place with specific exercises as shown in Table 1. By more precisely targeting meeting activities to achieve outcomes, we can make use of virtual and other meeting tools to make people and meetings themselves more effective. As an example, in-person, people typically use one main method for communicating information: the presentation. This is a rather blunt instrument. It subjects everyone to the same information at the same rate at the same time. Instead, we can micro-target information to specific people or teams, in formats that work for them, so they can interact and learn at their own pace while saving the synchronous time -- the time spent together -- for dialogue.

Outcome	Time/Place	Activity
Agreed upon facts on challenges and opportunities facing the organization	Mostly Anytime / Any place	Pre-recorded presentations sent in advance with synchronous Q&A/dialogue
Agreement on the annual strategy	Mostly In-Person / Synchronous	Synchronous discussion about potential approaches and priorities. Asynchronous voting or feedback.
Camaraderie among the leadership team	Blend of In-Person / Synchronous	Asynchronous sharing of information or insights about personal interests or background. Synchronous “breaking of bread” or other oxytocin-releasing activities.

To make this model work, however, requires some changes in mindset and behavior on the part of both meeting organizers and participants. These include:

- Read the read-aheads, watch the watch-aheads, and do the homework. During the pandemic, because “Zoom fatigue” had become such a known phenomenon, we had pretty good success in

getting people to take action and responsibility for better time management if it meant spending less time online and that included reading or watching stuff we sent them in advance or work to do offline. Hopefully we can build and expand on this so we can make more deliberate and intentional use of meeting time.

- Engage remote participants. If not everyone is in the room make sure the people online can truly participate. That may require everyone in the room to get online too, e.g., to use chat, polls, or online collaboration tools -- not relying on flipcharts or tools only accessible to people in the room.
- Ensure access, inclusion, and fairness. Again, the more consequential the decisions participants will make, the more important that everyone has access to the same information, is included in the exercises and decisions, and that everyone feels the the processes followed were fair.
- Don't over-schedule. One of the worst habits many of us developed during the pandemic is to schedule too many meetings back-to-back. In-person, we have the luxury of a captive audience and people mentally commit themselves to being present throughout the event. Urge participants to build some flexibility into their schedules in case meetings run over. Alternatively, meeting planners/facilitators should err on the side of publishing longer meeting times, e.g., if you think the meeting will last 90 minutes, tell participants two hours. Also build in time for reflection, networking, and making personal connections.
- Bring a virtual human touch. While we can't replicate online the oxytocin hit we get from shaking hands or patting each other on the back, the pandemic has often afforded us a deeper look into the lives of our colleagues. We've gotten to see their kitchens and living rooms, their children and pets, and something of their daily non-work lives. If empathy means to understand and share the feelings of another or to walk in the shoes of another, then this experience gives us something very close to exactly that. Continue to bring those kinds of insights and experiences into hybrid meetings. Perhaps have everyone join online beforehand and share something about their home or daily lives and then draw on that insight throughout the event.

As we begin contemplating the end of the pandemic and a return to "normal" we have the opportunity to deliberately choose which parts of our forced virtual experience we want to take forward. Overcoming the struggles the pandemic imposed on us required the collective work of so many people and teams and we have learned so much about how people interact on virtual platforms. We can take these lessons, combined with a better understanding of the role time and place play in the conduct of the meeting as the fundamental unit of human cooperation and use our knowledge to accelerate collaboration on problems big and small.