Hybrid Meetings Best Practices
Many of the best practices for hybrid meetings are the same for fully in-person and fully remote meetings. Generally, if you have meeting participants who are remote, everyone should log into the virtual platform (Teams, Zoom, WebEx, etc.) and participate remotely. This promotes equity for all participants, which should be at the center of all decisions surrounding hybrid activities.

Pre-Meeting Best Practices
Because hybrid meetings are more exhausting for all participants, they should only occur when there is a clear need. To ensure that a meeting is necessary, make sure you answer the following questions before scheduling a meeting. The decision tree below provides another way to think through the process.

- What is the purpose of the meeting?
  - There must be a clear outcome of having a meeting.
- Is the meeting for information gathering via discussion or a simple share out?
  - If a simple share out, find a different mode of delivering the information (email, chat, etc.).
- Where will the meeting be located?
  - If a hybrid meeting is needed, ensure that the room where in-person participants will be seated has appropriate audio and video equipment, as well as a strong internet connection.
- What is on the meeting agenda?
  - The meeting should have a clear agenda, structured around who is speaking, on what topic, and for how long. This agenda should be sent to all participants in advance.

![Decision Tree](image)

Technical Considerations Best Practices
When holding a hybrid meeting, be sure to test the technology in the meeting space before the actual meeting. Even if you hold in-person meetings in the same space without issue, hybrid meetings require different technology considerations to ensure that all participants feel engaged and included. Always practice with in-person and remote participants before holding an actual hybrid meeting.

- Collaboration:
  - Be sure to share all documents electronically before the meeting.
  - Consider using digital collaboration tools, such as Box, Google Drive, screen annotations, virtual whiteboards, or the chat function within the virtual platform.
  - Avoid having remote participants look at information written on the whiteboard in the physical meeting space via video.
- Video:
Ideally, those joining the meeting remotely will be able to see all the in-person participants. Likewise, it is helpful if they can see the entire room so they can observe body language or activities happening in the room.

In-person participants should be able to see remote participants. If available, consider having a projector display the remote participants so that they are large and more easily seen by everyone in the room.

Consider purchasing a standalone webcam and tripod that can be moved around the room to show remote participants necessary material in the room that cannot be shared virtually.

- **Audio:**
  - If there are multiple people in-person together, be aware of audio feedback and echoes. It is essential that, unless a room is specifically set up for audio conferencing, that only one person unmutes at a time.
  - If available, use meeting spaces with integrated speaker and microphone systems. If such a space is not available, consider getting an external speaker that will allow in-person participants to better hear remote participants.
  - Make sure that the person speaking says their name before they start speaking. This helps everyone follow along, regardless of their location.

**In-Meeting Best Practices**

Stick to the agenda during the meeting and have someone take notes that can be referred to afterward. These notes should include key takeaways, decisions, or action items, and who is responsible for completing them.

- Have an in-person facilitator lead the meeting. There should also be someone keeping an eye on chat comments, raised hands, and other activities of virtual participants.
- Establish a rule that everyone who wants to speak will raise their hand first. This will help both in-person and virtual participants avoid speaking over one another.
- Assign an in-person partner for each virtual participant. The role of the in-person participant is to ensure that their virtual partner is seen, heard, and engaged.
- When asking for feedback or questions, start with the remote participants first.
- Specifically call on people by name when asking for feedback or giving an individual the chance to speak. Avoid general statements, such as “Does anyone online have anything to say?” This usually results in silence and makes virtual participants seem like outsiders.
- Most in-person engagement activities (brainstorming, small group discussions, sticky note activities, etc.) can be effectively modified with little effort for a hybrid environment.

**Additional Resources**

- [Do You Really Need to Hold That Meeting? (Harvard Business Review)](https://hbr.org/2021/03/do-you-really-need-to-hold-that-meeting)
- [Running Effective Meetings (UW–Madison Learning & Talent Development)](https://www.boc.madison.edu/learning-development/running-effective-meetings)
- [Engagement Activities](https://www.boc.madison.edu/learning-development/engagement-activities)
- [Facilitating Hybrid Groups](https://www.boc.madison.edu/learning-development/facilitating-hybrid-groups)