



Hybrid Meetings

Setups

It is a misconception that people always multitask when attending meetings remotely. By following a few basics about the setup and use of technology, you can create engaging and inclusive hybrid meetings. We show you how.

Research shows that when properly planned and executed, hybrid workshops have people contributing even more than moderately planned remote-only or on-site-only sessions.*

The main conditions are:

Does the on-site location have the required technology? Do you have access to the additional technical equipment you need? Do you have the right software tools? Are participants used to using remote collaboration software?



For hybrid formats the following applies:

The hybrid format requires **more hosts**, i.e. moderators and supporters.

Hybrid takes **more time**: just unmuting and starting the discussions adds up to a longer meeting.

The **danger of frustration** for the participants is also heightened in hybrid formats. If you are not sure how to effectively counteract this, two separate sessions are often more advisable.

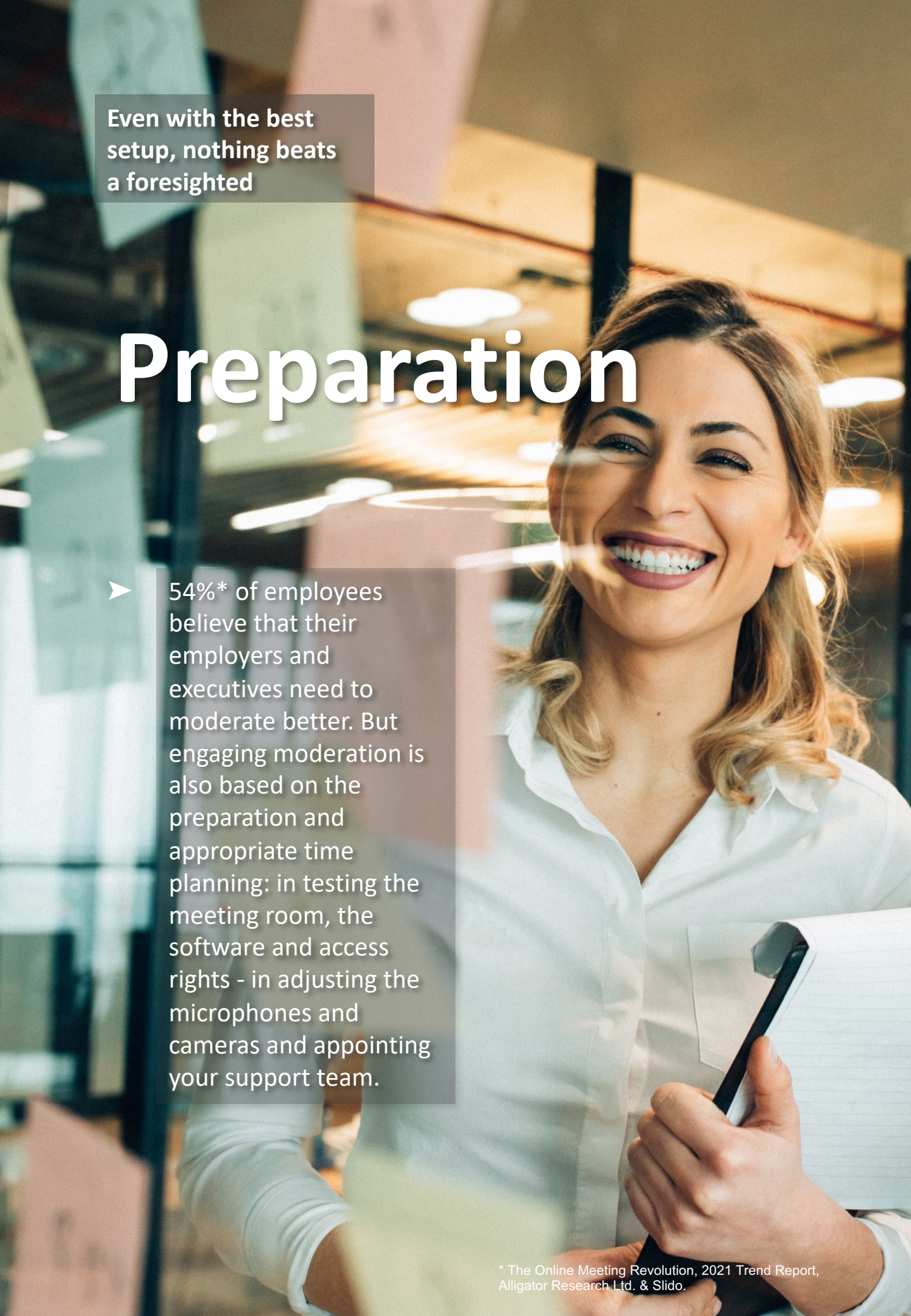


The basis of
your hybrid
meetings:

The Setup

- ▶ According to the DGU*, "zoom fatigue" is mainly attributed to background noise, poor image quality and other technical failures. You should therefore optimize all technical framework conditions long before you focus on your moderation. Here we show you essential setups as well as best-practice solutions.

* Praxishilfe Zoom-Fatigue (brochure), Deutsche Gesetzliche Unfallversicherung.



Even with the best
setup, nothing beats
a foresighted

Preparation

- ▶ 54%* of employees believe that their employers and executives need to moderate better. But engaging moderation is also based on the preparation and appropriate time planning: in testing the meeting room, the software and access rights - in adjusting the microphones and cameras and appointing your support team.



CHECKLIST

Infrastructures for Hybrid

Essential infrastructure

Teams/Zoom account or
guest access

3xTeam/Zoom accounts
for you & your team

WLAN with 30 MBit
down/10 MBit up

Best Setup Practices

3xWebcam/Notebook/
Software/Account

1. notebook: speaker
and screen sharing

2. notebook: flipchart,
smart & whiteboard

3. notebook: the local
audience

Preperation

Check the setup in the
meeting room

Adjust camera and
microphones

Avoid noise

Check the software's
host rights

Support-Team

Appoint a setup
manager

Appoint a remote
steward

Pre-onboarding of the
participants

Consider microphone
breaks in your schedule

Meeting

Prioritize the remote
audience

Make meeting rules
available to everyone

All cameras remain on,
with no exceptions

Mute all microphones

Turn off all on-site-
speakers

Only allow visible
communication

Mindset

Prioritize remote
participants

Draw and show
attention

Provide clarity through
clear instructions

Allow discussions as
sources of energy

INFRASTRUCTURE

Essential

- ▶ 1x Microsoft Teams / Zoom-account for each participant or a MS Teams setup, which allows guests (check beforehand)
- ▶ 3 accounts/notebooks with sufficient rights:
 - speaker's view
 - presentation or whiteboard/flipchart view
 - view of those present in the room
- ▶ Strong WLAN (no Captcha login, no guest WLAN), ideal: WLAN with 30 MBit down/10 MBit up

BEST SETUP PRACTICES

Best Practice: Internet-connection

- ▶ Connect moderator with LAN cable
- ▶ Backup plan for a possible WiFi-fail:
 - ▶ e.g. separate UMTS / 5G tower, smartphone tethering
 - ▶ portable 5G router with 5G data plan (e.g. ZTE 5G)



BEST SETUP PRACTICES

Best Practice: Lighting

- Additional light / additional spot on the moderator
- 2400 to 5000 lumens or around 500 lux is ideal for clear vision in conference rooms
- Warm color temperatures of 2700 to 3000K are recommended
- No fluorescent flashes as they can blur the cameras
- Provide rest rooms, if necessary breakout rooms with the same equipment



BEST SETUP PRACTICES

Best Practice: Video

- 3 webcams / notebooks (4K cams recommended) with meeting software and accounts:
 - Direct view of the speaker (can also be used for screen sharing)
 - direct view of the whiteboard, flipchart, and/or smartboard
 - direct view of the entire audience on site
- At least 1 large screen with all remote participants
- smart whiteboard or digital flipchart; alternatively: flipchart with large, dark board marker



BEST SETUP PRACTICES

Best Practice: Cameras

- Room camera, e.g. Poly e70, Microsoft Neat Board, Owl Labs.com etc.
 - Position the camera in line of sight of the audience to create a more natural communication environment
 - For small groups (up to 6): Everyone should have their own notebook with camera and join the meeting with their own account



BEST SETUP PRACTICES

Best Practice: Audio

- 2 Microphones:
 - 1x lavalier microphone for presenter
 - 1x omnidirectional microphone with loudspeaker system for the auditorium, taking into account the maximum supported participants.

Tips:

Do not use a separate loudspeaker: an echo can then be heard from all connected participants. Instead, use an integrated speaker and microphone system.

The microphone should be the same distance from all participants, e.g. placed in the middle of the table.

To avoid interference: always use a USB cable connection, avoid Bluetooth-connections.

An omnidirectional microphone is sufficient for up to 6 participants.

Use two connectable devices for up to 12 participants, and use ceiling microphones for more than 12 people.



BEST SETUP PRACTICES

Best Practice: Integrated systems

- USB video bar with integrated video, microphone and sound (e.g. Poly Studio, MS Neat Board, Epos Expand Capture)
- Intelligent microphone / loudspeaker combination with automatic speaker recognition and transcription for MS Teams (Neat Symmetry)
- Automatic framing of all participants in a room as separate speakers for MS teams (e.g. Owl Labs.com)



PREPARATION

Essential

- ▶ Test the meeting room in advance and check all the technology before each meeting.
- ▶ Adjust and aim your cameras and microphones.
- ▶ Pay attention to background noise: coffee cups, rustling snacks, etc. Place napkins under the coffee cups to avoid background noise and avoid rustling snack wrappers.
- ▶ Check the hosting rights for the meeting software in advance.



PREPARATION

Best Practice: Focus on engagement

It's not about simply adding a zoom link to a face-to-face event. Remote participants shouldn't just be listeners. If you want to create inclusion and engagement to actually work together, you need to get people to engage and feel equally involved.

- Only schedule activities that are appropriate for both on-site and remote participants.
- If the activity is not suitable for both, split the groups.

Rule of thumb: If people are having an experience on-site, people remotely should be having an equally good experience (e.g. lunch break conversations, 1:1 conversations...).

Same experience: If you schedule coffee breaks, lunch breaks and so on: why not order a pizza or lunch box for all remote participants via delivery services?



SUPPORT-TEAM

Best Practice: Support-Team

Appoint a person **in charge of the technology**, who :

- ▶ is responsible for host rights, breakout rooms, plan B etc.
- ▶ invites the remote participants and grants them access, controls the breakout rooms
- ▶ records the meeting
- ▶ is responsible for the audio and video check
- ▶ mutes microphones of remote participants and ensures that no background noise is transmitted
- ▶ mutes notebook speakers of participants on site



SUPPORT-TEAM

Best Practice: Support-Team

Appoint a **remote steward**, who:

- ▶ is the host for the remote / on-site connection
- ▶ ensures that remote participants are visible and can see everything
- ▶ summarizes questions from the chat and pronounces them for the remote participants
- ▶ gives the floor to the audience on site and those remote
- ▶ summarizes the on-site non-verbal communication for the remote participants (e.g. "The door just opened and colleague xy came in to say hello;" "Yx just spilled his coffee on the table and everyone is laughing.")
- ▶ repeats questions from the audience
- ▶ regularly reminds of rules (no loss of communication etc.)



SUPPORT-TEAM

Best Practice : Onboarding of the participants

The onboarding of the participants should be done by your support team, who:

- ▶ send documents for preparation in advance
- ▶ send workbook in advance
- ▶ build up a better report: first get in touch with the participants, e.g. by asking everyone what their expectations are
- ▶ conduct a short survey beforehand to prepare better and to fulfill the expectation management
- ▶ ask the participants about their current level of knowledge in order to better prepare moderation for the target group
- ▶ provide a short briefing about the hybrid setup and the rules at the same time



SUPPORT-TEAM

Best Practice : Proper time management

Be sure to take into account the peculiarities of hybrid formats:

- ▶ plan extra time for preparation.
- ▶ open the meeting for all participants 10 minutes in advance to enable coffee gossip among all participants - including remote participants.
- ▶ plan more breaks than usual: remote participants get tired more quickly because they miss the energy experience on site



MEETING

Best Practice: Meeting-process

- Greet everyone by name if possible
- Explain the setup: which camera is used for what, where the microphones are , etc.
- Explain the rules
- Remind local staff to look into the camera when addressing remote participants
- Schedule more breaks than usual: remote participants tire more easily because they miss the on-site energy experience
- Deal with the remote audience first. (Attention for the on-site participants comes automatically, but it is easy to lose the remote participants)



MEETING

Tips for the meeting-process

- If a question is asked, ask the remote audience first
- Attach a large sign to the spectator camera (smiley face, sticker, banner or similar) to remind on-site participants to look at the camera for distant participants
- Repeat the meeting rules and print them out as a poster in the meeting room for the participants on site
- All cameras stay on: if someone has a problem or needs to take a call, the same rules should apply remotely as on-site
- All microphones are muted except for the speaker (operated by host / moderator)
- All onsite speakers are turned off
- Only clearly visible and audible verbal or text-based communication is allowed
- Allow site chat to be text-only or summarized by the remote steward in chat only he can operate
- Always think of the remote participants first



MINDSET

Hybrid workshops require a **special mindset**:

- Prioritize remote participants
- Generate attention, direct it and show attention yourself
- Give detailed instructions and thus create clarity
- Allow discussions: they generate energy



MINDSET

Essential: questions, audience involvement

- Address remote participants first: “What is your biggest problem with the current delivery plan?” Have all participants raise their hands and have a connected participant go first
- Open questions and their answers from the audience are repeated by the moderator
- Try to replace all on-site verbal / non-verbal decision polls with a digital tool, such as mentimeter or Silo
- Ask questions to the audience in the presentation and provide a link to answer, e.g. via QR code
- Remote participants can answer on their notebook
- Participants on site can either answer on their notebook or smartphone on site

Best practice: questions, audience engagement

- Use simple, closed-ended questions or simple polls (binary or on a scale) for polls, and use a shared live document for open-ended questions



MINDSET

Essential: visual collaboration

- Use a flipchart/whiteboard as a non-technical alternative and aim the camera at it

Best Practice: visual collaboration

- Use a Miro board or Microsoft Teams whiteboard for everyone
- Involve more local participants here
- All participants register with their real name – without exception!
- Use a document as a live documentation tool (e.g. a Miro board, Confluence or Google Docs), viewable for everyone to stream and participate in



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