Designing Team Meetings
Leading Hybrid Teams Tip Sheet

WHY THIS MATTERS?
Team interactions greatly affect our ability to stay focused and our belief that our contributions are valued. If a meeting is important enough to bring your team together, it is even more important to do it well. When leading a meeting, whether in-person, online, or hybrid, it is important to ensure everyone can contribute meaningfully and that your team feels a sense of productivity and direction upon conclusion.

WHAT IS A HYBRID MEETING?
A meeting is hybrid when some of your attendees are onsite, while one or more are joining remotely. Managing hybrid meetings have unique considerations as two distinct groups are naturally created by proximity. Consideration needs to be given to how you will ensure everyone is able to contribute meaningfully and equally. This will support inclusion engagement, team cohesion, and will help to ensure a feeling of productivity and clear direction.

KEYS TO SUCCESS
Whether your meeting is in person or hybrid, many elements go into planning and executing productive and positive meetings. Here are a few to consider:

Meeting Purpose
Identify the goal of the meeting to determine what elements are needed:
- Information sharing
- Decision Making
- Problem Solving
- Skills Training
- Team Building

Clear Objectives
Clearly state the desired outcomes for the meeting using specific language:
- Agreement on...
- Clarity about...
- Shared understanding...
- Action list...
- Clear accountabilities...

Meeting Agenda
Create and distribute an agenda before the meeting outlining:
- What are the priorities?
- Timing/sequencing of agenda items
- Success indicators: how will you know if the objectives have been met?

Meeting Process
Outline what needs to be done before, during, and after the meeting.
- Engage everyone.
- Set expectations
- Delegate meeting roles
- Begin with a personal check-in
- Avoid conversations
- Document next steps/actions items

After the Meeting
Solicit feedback after the meeting and make any improvements. Distribute to the team:
- Meeting notes
- List of action items, deadlines, and who is responsible
- Links to, and process, for document storage

HOW TO HAVE PRODUCTIVE MEETINGS?
1. Decide on Format | Determine the best format to accomplish the identified meeting objectives. Some meetings are more effective in an in-person format, while others might lend themselves to a hybrid setting. For example, collaborative technologies such as Jamboard, Mentimeter, or the Google Suite lend themselves to activities like brainstorming and collective document editing. At other times, having all your team members in the same space may better facilitate discussions or your ability to “read the room” when engaged in difficult conversations.

2. Prepare and Plan Your Meeting for All Attendees | Before you schedule a meeting ensure you are clear on the meeting objectives, who needs to attend, and what the agenda will cover. Review each objective/activity and demine how team members will participate. Determine what tools, strategies, and technologies will maximize the meeting effectiveness and the team’s ability to meet the objectives. Use a meeting template for that can be populated prior to each meeting. Consider including time for team members to give quick updates on items not included on the agenda or to show appreciation for other team members. Share the authority/responsibility by varying who chairs the meeting and note taking, and updating the action log. Using a meeting template and adjusting as needed will help to facilitate this shared responsibility.

3. Support a Consistent Experience | If a meeting will be in a hybrid format, ask yourself: what do remote participants need in order to fully participate? Avoid presence disparity. Where possible, level the playing field by having all meeting participants on screen. If this is not possible, consider (re)scheduling for a time when everyone is onsite. Ensure everyone can see one another and has equal access to content and participation.
Managing a hybrid work environment does not mean learning a new skill set; in fact, the “rules” of running a great meeting have not changed much over the years. It does mean being more intentional about how you design and run your meetings to allow for a productive, positive, and engaged experience for all your team members.

Below are a few resources to sharpen your leadership competencies around planning and executing productive team meetings, regardless of meeting type.

**Articles**


**Videos**

Academic Impressions. Creating Equitable and Inclusive Meetings. 60 min

Academic Impressions. Leading Effective Virtual Meetings. 62 min

Grady, David. “How to Save the World (or at least yourself) from bad meetings.” Ted video, 6:32 min.

**Books**


Reed, Karin and Joseph A. Allen. *Suddenly Hybrid: Managing the Modern Meeting*. Wiley, 2022

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**SHARE KNOWLEDGE**

Working in a hybrid environment will be new for many people, and it will take time to learn how to best facilitate healthy and productive practices. You are not alone in this transition to a hybrid work environment. Some of us have more experience leading hybrid teams than others. We encourage you to talk openly about your successes and challenges. Share your ideas, tips, and tools with your colleagues. Be curious, ask questions, and seek support.

**WANT TO LEARN MORE?**

Human Resources, Health, Safety and Environment (HRHSE) offers a range of options for you to learn more about setting expectations, like team norms and ground rules, and holding your team accountable to them. We also offer extensive workshops and programs focused on leadership development.

Learn more about our leadership and professional development programming on the [HRHSE website](#).

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**RESOURCES & REFERENCES**

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Contact the Leadership and Professional Development Team at: [org.learning@ualberta.ca](mailto:org.learning@ualberta.ca)

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