



---

A Complete Guide to  
**Successful Hybrid  
Board Meetings**

---

The COVID-19 pandemic has changed many things for organizations. When everything started, organizations had to transition to remote operations so they could follow strict social distancing guidelines put in place.

For board and committee members, it was impossible to put their conversations on hold because of the situation. It was vital to discuss initiatives and collaborate to come up with strategies that would allow the organization to overcome adversity. That's why they turned to virtual meetings and communications.

Today, things are not as rough and organizations are able to return to the office, which has given way to 'hybrid meetings.' These allow board members to attend the meetings in person, while those with underlying health concerns can stay safe and attend remotely.

If you're new to hybrid board meetings, you'll be relieved to know you're not alone. Many organizations are trying this alternative for the first time and they also need guidance. That's exactly what we have to offer!

Based on our first-hand experience working with thousands of board members and administrators, we've put together this complete guide on how to set up successful hybrid meetings that organizations can use to bridge the distance between in-person and remote attendees.

## An Introduction to **Hybrid Meetings**

---

A hybrid meeting is when part of the attendees join in person and the other part joins remotely. Attendees who don't show up in person will use audio and video conferencing technology, which allows them to participate and share virtual content with other remote attendees.

Remote attendees can join the hybrid meeting wherever they are and they can listen to presentations, share their thoughts, and collaborate with team members. When it comes to board meetings, it's beneficial for all board members to be able to provide input even if they can't join in person.

More and more organizations are adopting hybrid meetings. In fact, data suggests that more than half of the meetings are happening virtually all over the world. That's not surprising since the pandemic has led organizations to adopt remote operations. It is thought as many as 25% - 35% of meetings are hybrid, and that percentage is expected to rise as restrictions continue to be lifted and normal operations can resume.

# The Advantages of **Hybrid Board Meetings**

---

The main advantage of hybrid meetings is that it allows all board members to attend, no matter where they are. However, there are even greater advantages for the organization, including the following:

## **01** Social and Geographical Barriers Are Eliminated

Hybrid meetings will allow you to eliminate social and geographical barriers, which means your organization will be able to have a more diverse board. When all board members are from similar backgrounds, things can fall through the cracks because they will fail to notice things outside of their own life experiences. With hybrid meetings, people from all over the country and the world can join in, even people with hearing or visual impairments will be able to participate.

## **02** No More Issues With Everyone's Schedules

Remote attendance can be the perfect solution if you're struggling to get everyone together in the same place. Schedules often clash and everyone leads busy lives, but hybrid meetings are convenient because it allows people to balance professional and personal priorities. With this alternative, people are no longer forced to attend in person. Plus, hybrid meetings will eliminate travel expenses and also save everyone a ton of time.

## **03** Board Governance Will Improve

The involvement of virtual meeting technology makes the planning and execution of board meetings a lot more effective. This is particularly true when there are dedicated board management tools in place such as BoardPro to allow the board to focus on governance issues that don't always receive the attention they should. Using the right tools will lead to highly focused meetings, targeted agendas, follow-up actions, and thoughtful conversations.

*These benefits will outlast the pandemic, so adopting hybrid meetings won't only help your organization now, it will also help it in the long run. Technology is always evolving, so the tools will become even more innovative and effective, which results in better engagement opportunities for boards.*

# The Drawbacks of Hybrid Board Meetings

---

Positive changes are not without their challenges and adopting hybrid meetings is not the exception. There are some drawbacks that you'll need to work past and a few common hurdles you'll have to jump through, such as:

## **01** There's a Risk of Reduced Participation

Though hybrid meetings allow for interaction, some aspects of it can be lost because face-to-face interaction will be reduced. However, this is an issue that can be addressed by making sure every engagement opportunity is provided. For example, using video can be used to encourage attendees to provide input and provide that missing face-to-face element.

## **02** More Hands-on Facilitation Is a Must

Attendees who are joining remotely need to be more hands-on if hybrid meetings are to be productive. This is why your board members must provide detailed agendas, encourage active participation, and use technology to keep everyone focused and productive. Without hands-on facilitation, it's very easy for the whole thing to be derailed and people will get side-tracked.

## **03** The Obstacle of Security

Whenever you're sharing confidential information on the internet, a data breach is a big risk. That's why hybrid meetings require reliable technology. You need to cover your cybersecurity bases to make sure your meetings are 100% secure.

*Hybrid meetings don't have to be drastically different from traditional meetings, but they do require planning and extra time needs to be put into preparing everything so you can avoid the drawbacks we've just discussed.*

# How to Set Up Successful Hybrid Board Meetings

---

## **01** Choose the Right Software

The choice of software for your hybrid board meetings has to be a conscious one and you need more than just audio and meeting tools. You want complete functionality to make the most of the meeting and the tools you use should either integrate with or link to your board management platform so everything is in one place.

### ✓ **Video conferencing technology.**

Face-to-face interaction is a must because it keeps people engaged and connected. There are many great platforms that provide top video conferencing technology, such as Google Meets, Zoom, and Microsoft Teams. These platforms are easy to join and they allow attendees to see each other and view documents in the same window.

### ✓ **Agenda builder.**

A well-crafted agenda is the backbone of successful hybrid meetings because they allow people to stay on track and accomplish their goals in a timely manner. BoardPro's Agenda Builder is one of the best tools out there for meeting agenda building. With it, you'll be able to create detailed meeting agendas with intended objectives and time limits.

### ✓ **Virtual voting.**

Decision-making can be a challenge during hybrid meetings, but BoardPro makes virtual voting super easy by quickly capturing votes on important decisions. Using this feature will make it easy for everyone to participate, even remote attendees. Anonymous voting can also be enabled for sensitive decisions.

## 02

### Set Some Ground Rules

For hybrid meetings to work, the expectations need to be communicated not only beforehand, but also at the beginning of the meeting. Setting the ground rules is something that you need to do for every meeting.

Additionally, you must train remote attendees on proper etiquette, which will allow virtual and physical boardrooms to be in sync. These are some of the most important ground rules you need to set

- ✓ **Remote attendees should mute their microphones whenever they're not participating to eliminate background noise.**

---

- ✓ **They should raise their hand or send a message to signal they want to provide input or ask a question.**

---

- ✓ **They should be ready to use their camera and wear proper attire.**

---

- ✓ **They should close their tabs or minimize them to prevent any distractions.**

---

- ✓ **They should send a message when they're stepping away from the call and do the same when they come back for accurate minute-taking.**

---

Some organizations also set a minimum in-person attendance requirement because it tends to drop when hybrid meetings become an option. You need to make it clear that remote attendance is not an alternative to physically participating in meetings on a regular basis.

## 03

### Create an Agenda for the Meeting

As we discussed before, the agenda is the backbone of the meeting and it's what will determine how successful it will be. It will serve as a roadmap that will help the board navigate subjects effectively to address all relevant items.

If your agenda is disorganized or incomplete, the meeting won't have a pace and it will derail very quickly. Here are a couple of tips for a well-crafted agenda:

- ✓ **Each task needs a goal.**

Agenda items have a clear purpose; to inform, seek input, and lead to a beneficial decision. As such, it's important for each task to have a clear goal because that will make it a lot easier and less time-consuming to achieve in the end. Make sure each agenda item has an objective and the meeting will be successful.

## ✓ Set a time limit for each task

When it comes to discussing agenda items, it can be very easy to lose track of time and talk about the options for hours. However, it's important to be effective, which is why it's important to set a time limit for each agenda item. Otherwise, you risk spending too much time on a topic and too little time on another.

*With a tool like the BoardPro's Meeting Agenda Builder, you will be able to create effective agendas for your hybrid board meetings very easily to make the most out of everyone's time and get the results you're looking for.*

## 04 Host the Meeting!

It's important to engage and participate in the hybrid board meeting even if it's tempting to just watch things unfold. You need to be a good host if you want to keep things productive. Here are a few tips to help you do that:

- ✓ **Encourage all attendees to speak at the beginning of the meeting. Your remote attendees will be a bit apprehensive about participating at first, but once the ice is broken, some of the tension will be released and they will feel a lot more comfortable.**

---

- ✓ **Choose an in-person attendee so they can be in charge of monitoring the people who are connecting online. This person will make sure your remote attendees are being heard and they will also be able to address any connectivity or audio issues before it becomes a bigger problem.**

---

- ✓ **Provide a consistent experience for both in-person and remote attendees. The equivalent of what happens in the physical boardroom should also happen on the virtual platform so everyone gets the same experience. Everyone should be able to access the same information at once.**

Another thing you can do is encourage your in-person attendees to look at their laptops when they're speaking to remote attendees so they can feel like they're included. This is a small gesture that will make a big difference. Overall, when you prioritize engagement, you'll have hybrid board meetings that are not only productive but also more focused and enjoyable.

# 05

## Follow Up With Attendees

When a hybrid meeting is successful, it will result in different follow-up tasks, so you need to keep an eye on that and track people's progress. The BoardPro tool will allow attendees to take notes, record decisions made during the meeting, and assign actions so attendees can easily reference their actions. With this automated workflow, everyone will be able to follow up on unfinished tasks and you'll be able to track everything.

You should also ask attendees for their feedback and insight. Having their perspective is valuable because it will allow you to improve the experience in future hybrid meetings, so make sure you ask them to summarize their experience, rate the qualities of the meeting, and make suggestions as well.

If you want a truly successful board hybrid meeting, get the BoardPro free trial today! It will make planning a lot easier so your hybrid board meeting is as productive as possible.

