



Ever since Simon Sinek started talking about “Start with Why”, people and organizations have struggled to find “their purpose.” In an organization, this is when your team envisions and articulates the greater good. They share a vision. Their purpose drives decisions and people find their work meaningful.

Whether or not you consider yourself or your team purpose-driven, I suggest that you have a frank and authentic discussion about what you are NOT doing yet but SHOULD be doing. Talk about what you can do differently. This month's book can help with a few steps to take to get there.

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#### HYBRID BUSINESS MEETINGS: TOP 10 TIPS TO LEAD EFFECTIVELY

Hybrid business meetings - those business meetings that have an in-person AND virtual element - are the norm vs. the exception and I don't see that changing any time in the near future.

It is the "hybrid" aspect that knocks people for a loop: Most leaders believe they have a certain level of proficiency when it comes to running an in-person meeting (although that may or may not be correct!) - and they HAD to develop the skill to lead a virtual meeting during the COVID pandemic.

But now, in these post-COVID times (dare I say that?), there is an expectation that anyone should be able to participate from anywhere - regardless of the type of meeting. Even when you declare that the meeting will be an in-person meeting, there will be those who want to "dial or Zoom in" - and the expectation is that they will be able to fully participate vs. just listen in!

As a professional meeting facilitator, hybrid business meetings are simply harder to design and coordinate as you need to meet the needs of two audiences and ensure an appropriate level of engagement and collaboration. So here are my top ten tips to lead and/or facilitate an effective hybrid business meeting:

## Top Ten Tips to Lead an Effective Hybrid Business Meeting

1. **Design the agenda with *all* audiences in mind.** We tend to have a preference - favoring the in-person meeting format OR the virtual format - and that tends to fall in line with where you are leading/facilitating the meeting. So we tend to "forget" the audience that we are not directly interacting with. Design an agenda that serves both audiences, ensuring that all voices are heard and considered.
2. **Assign/Collect Prework.** Attention spans have gotten shorter, so meetings have gotten shorter. What you used to take a day to accomplish, people only want to spend half a day. So assign pre-work to hit the deck running! Send pre-reads (e.g. a pertinent article, briefing deck/book), a survey to gather ideas to present as a "strawman" for the group to react to, or a simple notification to "come prepared to discuss/share..."
3. **Intentionally Design Interaction Moments.** At some point, the two audiences need to intersect - whether it is generating ideas, organizing those ideas, meeting in smaller groups to discuss or flesh out a question or idea, or taking a poll to see how close we are to coming to a decision. (I call this the GODA process) This, my friends, takes some serious thought. Here are some quick ideas:
  - *Generate* - if you are simply making a list from existing parts and pieces, then consider creating that list before the meeting (aka "prework"). If you want to brainstorm a creative list, then capture the ideas on a flipchart with a dedicated webcam, a smart board that can be shared or an online whiteboard/document, so all can see what's being said.
  - *Organize* - This gets a bit trickier as there are several different ways to organize a list: Prioritize, categorize, or put into a time/process flow. When prioritizing, you can have all the participants use an online tool such as Slido (but you'll need to generate inside the tool), or use an in-person technique - just be particularly mindful of the virtual audience (webcam on the flipchart, an "ombudsman" to post their dots). When categorizing or putting in a flow, that requires physical manipulation of the ideas. There are plenty of online tools out there for the entire team to do this (Jamboard, Mural, Miro), however, I rarely enjoy the process of having everyone's heads down looking at a laptop. The key to prioritizing is a "quick sort" so I usually ask permission for the in-person people to let the online people sort the ideas quickly....realizing that the REAL discussion comes in the conversation about the groupings of ideas.
  - *Decide* - Once you have some substance to discuss and decide, depending on the number of people in the room, we'll either have a whole group conversation OR move into small (breakout) groups. Bob Frische and Gary Greene in an HBR article say, "the easiest solution is to include all the remote participants in a single group. While simpler, this sends them the wrong message by reinforcing their physical absence. It's likely worth the extra logistical and technical effort to integrate remote participants across several breakout groups to accentuate their equal status." One other thing about finalizing a wildly important decision: I always like to do a straw poll to see how close/far apart we are to a consensus. You can also use Slido to help with this as well.
  - *Take Action*. Throughout the meeting, you've been collecting ideas to take action. At key points, or at the end, it's time to identify if that action is still necessary, who should do it/make sure it gets done, and by when it should be done. Unless the nominator of the action agrees to take it on, make sure

you canvas both the in-person AND virtual participants, starting with those you tend to forget FIRST.

4. **Have an "Ombudsmen" Ready.** I always find it helpful to have someone who is the advocate for the people online - e.g. watch for a raised hand, look at the chatbox, see if the visuals are visible, and to remind the team to call on them if we skipped them during a round-robin/go around the "room" activity. It is also helpful for the virtual participants to have one point of contact to handle any of their tech or otherwise unique issues. Especially if you break into small groups, each small group will need to have an in-person ombudsman who can make sure the virtual participants can participate fully in the breakouts.
5. **Have a Skilled Facilitator.** It's a smart investment to have a "facilitator" in the room as the conversation can be quickly dominated by the in-person participants, among other things that can go wrong in a meeting. But more importantly, a skilled facilitator knows how to design and navigate the process, weaving in the best from *all* the participants, and ensuring the best possible outcome.
6. **Upgrade Audio.** Over COVID, it became obvious that everyone needed to invest in better audio equipment, therefore, I'm assuming your remote participants have a good headset or external microphone. (If not, go get one!). The in-person world is no different, however, many meeting rooms are not equipped with enough high-quality microphones so remote participants can hear the *entire* conversation in the room - not just fragments! Otherwise, consider supplementing your audio input by having in-person attendees pass around hand-held microphones before speaking or assigning a microphone to each/couple of participants.
7. **Cameras On.** For remote participants, "Video off" is not an option unless you have visual distractions going on or you are eating. Otherwise, turn the camera on. For in-person meetings, consider upgrading your meeting room technology to include the capability that separates in-room participants into their own individual video tile e.g. Zoom's Smart Gallery. In the pre-Covid days, I used to set a picture frame of each remote participant at the table so we wouldn't forget them as we "go around the room." These days, you can project the Zoom meeting and "split screen" so you can see the main visual AND the remote participants and/or set up two additional large monitors on either side of the main screen with "panes" of the remote participants for the duration of the meeting.
8. **Spotlight Visuals.** Think through what the remote participants will need to see during the meeting: their fellow attendees, presenters, flipcharts, and wall charts. Set up separate laptops with webcams that can show close-up views of each visual.
9. **Check Tech.** Test the audio-visuals for both the in-person and remote participant experience *on the day of the meeting*- and then leave the meeting OPEN. For really important, high-stakes meetings, also do a tech check a day or two beforehand.
10. **Finish with a Critique.** A best practice of high-performing teams is to finish each meeting with a critique: What went well and what could we have done differently? Especially as we move into this new world where hybrid is more the norm than not, take time to celebrate what the team does well and intentionally change/tweak a few things for the next meeting!

As you can tell, there are many more moving pieces to a hybrid meeting. Depending on the size and purpose of your meeting, you may determine that hybrid is not the best approach. University of Colorado UIS Service Desk says, "Some teams follow a 'one remote, all remote' principle: If one person is attending remotely, then those in the office also

connect online using individual devices. This allows everyone to have the same experience and to participate equally."

I've also seen the other side of that hybrid business meetings coin: Everyone needs to be in-person. Period. We are not going to do hybrid simply because this meeting is too important NOT to have it face-to-face!

## **ADVANTAGES AND DISADVANTAGES OF A PANEL DISCUSSION**

When considering various formats for an upcoming meeting, consider the advantages and disadvantages of a panel discussion - a live (or recorded), in-person, virtual, or "hybrid" discussion about a specific topic amongst a selected group of experts who share differing perspectives in front of an in-person, virtual, or geographically dispersed audience.

### **Advantages of a Panel Discussion**

- **Less Panelist Preparation.** Many executives, subject matter experts, and practitioners are unwilling to prepare for a speech or breakout session. They may, however, agree to a small amount of panelist preparation.
- **Fresh Information.** Because there is less of a burden to prepare a formal presentation, panel members can share fresh, breaking information that may not be widely known or available to the audience.
- **Shared Responsibility.** The success of a session largely depends on the people at the front of the room e.g. "on stage". When using just one speaker, all the responsibility rests on that one speaker! If the speaker is awesome, that's great! But if the speaker is so-so, that's not-so-great... When you have a moderated panel of experts, you have increased your odds of having an awesome panel with multiple speakers!
- **Change of Pace.** Today's audiences want multiple formats - and the panel discussion is one among many.
- **Multiple Points of View.** A speaker provides only one point a view; a panel provides multiple points of view.
- **Insights into the Real World.** It is one thing to talk to the audience about a topic; it is another thing altogether to bring together practitioners in the real world to talk about their experiences and insights into the topic.
- **Allows for Audience Interaction.** The moderator and panel members can engage the audience periodically during the panel or entertain a question and answer (Q&A) session toward the end of the panel discussion.

### **Disadvantages of a Panel Discussion**

- **Overuse.** While a panel discussion peppered here and there during your conference or convention works well, overuse of this format can make the experience too repetitive.
- **The Unknown.** Even though the panel organizer and/or moderator have carefully planned and scripted the panel, it remains a spontaneous discussion - and sometimes the unpredictable happens in front of an audience!
- **More Coordination.** The meeting organizer and/or moderator has not just one speaker to attend to, but at least three to five other people to shepherd. This will require more coordination in preparation and right before the panel discussion.
- **Not-So-Great Panel Moderator.** Even with lackluster panelists, a skilled moderator can save the day! But if the moderator is unskilled and unable to facilitate the conversation, the conversation will quickly disintegrate.

- **Not-So-Good Panelists.** Not every expert is a good communicator (I call this "eloquence"), so you want to do your due diligence when selecting your D.E.E.P. (Diverse, Expertise, Eloquence, Prepared) panelists.
- **Strong Personalities.** While you want to have a diversity of opinions, some experts may have not only a strong opinion, but a personality that bowls over the discussion.

Many of these disadvantages of a panel discussion are simply limitations that can be mitigated during the planning process - so don't let them dissuade you from realizing the advantages of a panel discussion!



## ADVANTAGES & DISADVANTAGES OF A PANEL DISCUSSION

ADVANTAGES	DISADVANTAGES
 Less Panelist Preparation.	 Overuse of Too Many Panels.
 Fresh Ideas & Information.	 The Unscripted Unknown.
 Sharing Increases Chance for Success.	 More Coordination.
 Different Format Changes the Pace.	 Needs a Skilled Panel Moderator.
 Multiple Points of View.	 Not-So-Good Panelists.
 Insights into the Real World.	 Strong Personalities.
 Allows for Audience Interaction.	

For more information about how to moderate a lively & informative panel discussion, Contact us at [www.PowerfulPanels.com](http://www.PowerfulPanels.com)



## **FROM THE BOOKSHELF: THE ECONOMICS OF HIGHER PURPOSE**

With the popularization of Simon Sinek's "Start with Why," the purpose-driven life and organization seem to have ingrained themselves into business conversations. But how, precisely, do you do that...and still make money?

Robert E. Quinn and Anjan V. Thakor, in their book, "The Economics of Higher Purpose: Eight Counterintuitive Steps for Creating a Purpose-Driven Organization" explain why purpose-driven organizations have failed to gain traction and the evidence that they can and do make money as well (if not more!).

One author is a professor of management and the other is a professor of banking and finance, so I got a crash course on business economics and of a higher purpose.

### **Purpose-Driven Points to Ponder:**

**The foundation of business economics** starts with a "conventional mindset" where "principals (bosses) and agents (employees) engage in conventional relationships of transactional exchange: for this amount of money, we agree that you will do this amount of work."

**The foundation of a higher purpose** is a "social system in which the greater good has been envisioned, articulated, and authenticated....[It is] the arbiter of all decisions, and people find meaning in their work and in their relationships despite the conflicts. They share a vision and are fully engaged. They strive to transcend their egos and sacrifice for the common good."

The authors, rather than believing these two theories are mutually exclusive, set about to find where they intersected...and go from there.

Ironically enough, Part I is about why we should consider being a purpose-driven organization - and the dangers of faking it e.g. making it a PR campaign vs. the way to do business. Part II is the 8-step method, which frankly, isn't THAT counterintuitive, but definitely requires some intentional thought and actions. The steps seem simple enough, but will probably be hard (not easy!) to do.

I have three clients who consider themselves to be purpose-driven organizations (or on the path toward calling themselves such). I am suggesting they read this book and confirm what they are doing well - and then have a frank and authentic discussion about what they are NOT doing yet SHOULD be doing and/or what they can do differently based on the various steps.

One final thing: You don't have to be the CEO to read this book and implement these purpose-driven ideas. You can use this book as an individual, team, business unit, or enterprise level. Good luck!

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