

Top Tips for Leading Discussions In a Hybrid Briefing

Hybrid briefings have arrived and seem to be here to stay. The challenge is how to become comfortable and embrace leading discussions with customers in the hybrid world. Without effective planning, you may not be able to connect and engage with your customers in a meaningful way.

Adjusting to hybrid environments requires combining strong face-to-face and virtual skills. We suggest you review these tips and begin incorporating them into your hybrid discussions with customers. The result will be customer discussions and presentations that are interactive and help you and your sales organization achieve your goals.

Practice, Practice, Practice

Go to the physical meeting space in advance to learn the technology and become comfortable with it. Be sure to determine how to get technical support if needed during the briefing. Depending on your set-up, practice should include working with:

- Audio capabilities (Are there enough microphones? How is the sound quality? Can all participants hear each other?)
- Video capabilities (Can remote customers clearly see the in-room customers and vice-versa? How many cameras are there? Where are they located?)
- Sharing capabilities (Can remote customers easily see the slides, whiteboard, and other applications that the discussion leader will be using? Are there any other features unique to your technology with which you should be familiar?)

Build Customer-Centric SCI-PAB® Opening for a Hybrid Briefing

Leverage the Opening Action from your Mandel Blueprint® to engage the remote and in-room customers. Examples:

- “During this meeting, I am asking those of you in X location and those of you here to please...”
- “Whether you are practicing remotely or are here in the room with me, please...”
- “For all remote attendees, please turn on your cameras...”

Modify Your Delivery Skills

Be prepared to adjust your face-to-face delivery skills to accommodate the remote customers.

- **Eye Contact:** Speak to in-room and remote customers equally by talking to the camera as if it is a person in the room.
- **Gestures and Movement:** Be aware of the camera framing to be sure the remote customers can see your gestures and movement.
- **Voice:** Speak loudly and clearly enough for the microphones to pick up your voice.

Facilitate Effectively

Experiment with different approaches to keep all customers involved.

- Repeat relevant side conversations that may happen during breaks, so all customers feel part of the discussion.
- Call on remote customers first and pause longer than usual so you do not speak over each other.
- Consistently check in with remote individuals to be sure they can see, hear, and understand what is happening in the room.

Clarify How Customers Communicate

- Consider the best ways for remote customers to contribute to the discussion.
- Encourage remote customers to turn on their cameras.
- Ask participants to either verbally share their insights and ideas or to use the platform tools (e.g., hand raise, reaction icons, and chat). Determine in advance what you want them to do and how you will monitor their input. Plan this in advance with your briefing moderator if one is required.
- Request that participants state their names prior to speaking each time. If appropriate, use large name tents for the in-room customers.

Contact the Mandel Team to learn more:

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