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# Hybrid Meetings Playbook

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# Maximize the Value of Your Hybrid Meetings Program

*As face-to-face meeting planning resumes, it is becoming clear that, for a variety of reasons (and not necessarily pandemic-related ones), some attendees are not as willing or able to travel to a meeting or event. The hybrid meeting format, in which some attendees are in-person and some attend virtually, allows meeting professionals to accommodate individual attendee needs while meeting corporate objectives and following regional restrictions. Additionally, allowing attendees to be virtual may increase overall attendance, giving a meeting a broader reach without incurring travel costs. Companies that incorporate a specific hybrid meeting program into their strategic meetings management program (SMM) can make the most of this format.*



## **SECTION 1** p4

A step-by-step process for incorporating hybrid meetings into your SMM program.



## **SECTION 2** p6

Key considerations for planning hybrid meetings and events.

# Design Your Hybrid Event Strategy

*Just like in-person events, there is a lifecycle to every hybrid event. Defining objectives, budgeting, sourcing, meeting logistics, attendee management, payment, and reporting – all need to be included in a hybrid project management plan. The complexities of managing both live and virtual attendees safely and seamlessly require a strategy that integrates operational excellence with strong program governance across duty of care, supplier behavior and technology.*

There are five key areas to address when designing a customized hybrid event strategy for your SMM program.

## 1. Understand your stakeholders' specific needs and opportunities

Survey your stakeholders to determine the forecasted meetings and events activity over the next 12 months. Are they open to piloting a specific meeting type as a hybrid event? How much appetite is there among the different business units to consider shifting any events to a hybrid format? Every company has its own unique SMM program needs, and understanding those needs is critical to develop an effective strategy.



**TIP:** Include “wish list” meetings in your plan. With a hybrid option and new strategies being implemented, it may be a good time to include the programs that have been on the back burner.

## 2. Design the program strategy

The next step is to determine the key foundational objectives for your SMM program, particularly as the company resumes normal operations. What are the important areas of focus over the next 12 months, and which meetings and event types are going to take priority? A robust strategy will include realistic objectives and a plan to measure ROI, keeping in mind that there may be different metrics of success for in-person vs. virtual attendees.

Consider identifying a champion within your team who will lead the hybrid program. The role would be responsible for providing full visibility into all hybrid activities across the company and demonstrating how they support SMM objectives.



**TIP:** Make sure to review meeting and travel policies to confirm that virtual and hybrid meetings are well defined and have clear attendee parameters.

## 3. Identify the technologies needed

There are opportunities across the hybrid lifecycle to use technology to create engagement and increase efficiency — and there are a plethora of technology suppliers offering tools and solutions for every touchpoint. Assess the different options available and identify who your preferred technology suppliers will be for the hybrid program.



**TIP:** Reach out to colleagues and peers for technology solution recommendations. Experience matters!

Once the technology has been chosen, make sure that stakeholders have time to learn about and interact with it before any events take place, so that comfort levels are high and there's no need to learn on the fly.

## What makes a good hybrid event?

Certain meeting types are more suited to a hybrid format than others. For example, if the purpose of the meeting is to share information or provide product demonstrations, it may be a good candidate for a hybrid event. The hybrid format is best suited for events that require a level of face-to-face engagement for select attendee groups (such as customers or partners) but do not require all attendees to be in-person.

Other considerations for whether to create a hybrid format include lead time, costs, and venue capabilities. Compared to virtual meetings, hybrid meetings are more complex to plan and more costly due to expenses associated with travelling attendees and the increased technology and production requirements. Venues need to be chosen based on their capacity to reliably support not only the face-to-face experience but also the virtual connection.

The types of meetings that work best in a hybrid format are:

- Prospective client meetings
- General business meetings
- Training programs
- Internal meetings
- Program/project management meetings
- Regional/national sales meetings

## 4. Build an operational model

This step is about building the operational team. Identify the resources needed to manage a hybrid program. Whether it's internal or through a third-party supplier, decisions need to be made in sourcing, logistics and technical delivery, preferably in consultation with stakeholders to determine what their expectations are for the best experience.



**TIP: Build extra time into your plans. With hybrid being new and some content being recorded, plan for extra time needed prior to the event.**

In addition to a dedicated team, create tools and resources for all meetings and events planners and stakeholders to use and refer to, to be certain that all events comply with risk guidelines and anticipate attendees' needs and concerns.

## 5. Align, train, and engage stakeholders

The last step in creating a hybrid event strategy is to make sure that all team members and stakeholders are aware of and engaged with the hybrid program. Strong, visible executive sponsorship and support goes a long way to helping speed up company-wide adoption. When creating the communication and training plans, include touchpoints across stakeholders, attendees, and suppliers, using the appropriate engagement channels, to drive awareness and compliance for the program.

Once the hybrid program is operational, review and adjust the strategy and delivery as necessary.



**TIP: Make sure to regularly solicit feedback from stakeholders through council meetings and “pulse checks”; consider jointly designing decision trees and event checklists to set the right expectations for the program design and delivery and to build and maintain trust across the stakeholder base.**

## SECTION 2

# Put the Strategy into Action

*Having a formal strategy and meeting policy in place lets meeting planners focus their efforts on maximizing the attendee experience and creating the best event possible. The dual nature of hybrid events means that, in many ways, planners are creating two different events. In each case, the following areas must be considered.*

## Communication

Communicate early (and often).

As soon as an attendee list is identified, ask both in-person and virtual attendees what they want to get out of the event and be sure to use their responses to inform the planning. Once plans have taken shape, begin a pre-event communication campaign that engages and informs attendees — for example, pre-event polling and quizzes.



**TIP:** Mobile apps allow you to begin messaging and allow attendees to network ahead of an event. They can also be used to extend the life of an event once it's over.

For in-person attendees, make certain that they are aware of all safety precautions and regulations well ahead of time. This is a time to be meticulous: explain hotel safety certifications, safe travel programs, local emergency preparedness, the current regional health situation, available onsite medical care, etc. The goal is to make sure that attendees know in advance exactly what they can expect from the minute they walk out the door until they arrive back home.

For virtual attendees, check that they are comfortable with the technology they will be using and that they understand all security measures and privacy requirements. Provide them with user FAQs and access to tech support ahead of time.

Set up social channels ahead of time so that users can connect before the meeting starts. Whatever platforms are used (Discord, Facebook, Twitter, etc.) should be updated with new content regularly, both before and during the event.

Make sure that communications to in-person attendees during the event are replicated to virtual attendees (if appropriate).

Engage with attendees after the event, through polling and social channels. Find out what worked and what didn't and adjust as necessary for the future.

## Health and wellness

Create a health and wellness policy and keep it top of mind when making decisions about events. Don't forget that some in-person travellers may be feeling nervous about attending. Meeting room setups that support social distancing and using outdoor spaces whenever possible can help attendees feel safe.

In addition, be sure to incorporate opportunities for self-care and mindfulness into programming. Healthy food, regular breaks, and offering physical activities such as stretching or guided walks can keep attendees engaged, alert and motivated.



**TIP:** Virtual attendees can be included in many wellness options; for example, they can participate in a livestreamed yoga or meditation class during a break, or they can have the same healthy snacks delivered to them that the in-person attendees are offered.

## Risk management

Partner with security and risk teams to assess all potential risk exposures that could occur during a hybrid event. Use that assessment to create controls or adjust policies to drive stakeholder and attendee behavior and outcomes.

Be detail obsessed! Go over your meeting plan and review every single step to anticipate where issues may arise. For example:

How will attendees get to the airport or train station? What happens when they arrive at their destination — will they have to find a taxi stand or will they be met by a shuttle?



**TIP: Having a mobile app that attendees become accustomed to using prior to the event will be helpful when last-minute messaging is necessary.**

- What is the hotel's safety program and how will that affect attendees, suppliers, and team members?
- If you are sending care packages or products to virtual attendees, what are the logistics and deadlines around those deliveries? Have you asked about food allergies and other potential dangers before sending anything?
- Do your presenters have special requirements (i.e., masks, audience size, seat spacing, ventilation, etc.), and if so, how will they be accommodated?
- Are your virtual presenters aware of the corporate code of conduct?
- Is there a backup in place for the virtual streaming in case of power failure?

## Supplier optimization

Use preferred suppliers for hybrid meetings whenever possible, including venues, technology suppliers and ground transportation companies. This provides accountability in the service delivery experience, ranging from safe food and beverage and meeting

room setups to sufficient and uninterrupted internet bandwidth in meeting rooms for virtual content streaming. Suppliers that operate across multiple locations can deliver a seamless and consistent technical and logistical experience.



**TIP: When possible, utilize your hybrid technology solution prior to the event so attendees can become familiar with it.**

Using preferred suppliers also offers more flexibility in case attendee numbers change at the last minute, due to forces outside your control. As the global health regulations are still in flux, the number of people who decide to travel could be more or less than planned for. Check that your contracts account for this uncertainty.

## Diversity

A diverse supplier strategy can broaden your company's brand identity and reach and support corporate social responsibility initiatives. Develop a strategy to procure and work with suppliers from minority-owned, women-owned, veteran-owned, disabled-owned and LGBTQ+ owned businesses. Find out what, if any, diversity programs your preferred suppliers have. Reach out to any organizations that are certified as diverse suppliers and see if they will fit your event's needs.



**TIP: Be particularly mindful of diversity when inviting attendees and speakers, and make sure you have a plan to accommodate attendees from diverse backgrounds through the lifecycle of the event.**

## Sustainability

A thoughtfully planned hybrid event can have a measurable impact in a company's sustainability program. By choosing locations where the highest number of potential attendees live, travel and its associated carbon footprint is reduced. Incorporate sustainability initiatives into the event's in-person portion, including but not limited to reducing food waste, water consumption, single use plastic and

paper use. Question whether printing is required, and whether gift or swag bags full of disposable items can be replaced with a more environmentally friendly option.



**TIP: Provide the option of attending an event virtually as a sustainable action your attendees can choose to take.**

## Technology

Technology in hybrid events refers to everything from mobile apps to broadcast platforms to attendee registration sites to A/V production and equipment. There are many different pieces in the technology component of a hybrid event.

A preferred technology supplier strategy across all hybrid events will provide virtual technology and production solutions that support security and privacy requirements while driving strong user experiences. Key technology features to consider include user accessibility and interface design, content management, social activity options, ease of audience communication, gamification, enhanced onsite experience, and post-event measurement and engagement.

At the venue, make sure that the IT services or third-party supplier are prepared for any outages. Check the internet speed at the site, and review camera angles and lighting to be certain that the streamed video will be engaging and interesting on screen.



**TIP: Consider technology suppliers that provide a package of solutions.**

Customize online waiting rooms and the graphics that virtual attendees will see in-between presentations. Use the event identity to create the look and feel, rather than generic “waiting to join” screens.

## Attendee experience

Maximizing the experience at a hybrid event requires understanding attendee objectives and personas, and then customizing the meeting plan so that at every touchpoint both the face-to-face and virtual attendee

needs are met. Anticipate the in-person attendee’s needs and perceptions around health and safety measures. Make sure your meeting design accounts for different personas, by offering network and fun events for those who want to join in without making those who’d rather not participate feel left out.



**TIP: Meals delivered to virtual attendees’ homes will help them feel special and make the days of the event unique.**

For virtual attendees, make the most of the technology you have. Use breakout rooms that mix in-person and virtual groups; during live Q&As, be sure to include questions from both sets of audiences; use an event app that allows all attendees to interact and network; create videos or special content for virtual attendees to engage with during in-person coffee breaks.

To provide a feeling of inclusiveness, address virtual attendees separately with a special pre-recorded executive welcome prior to or following the general session. Pre-recorded messages and gamifications can re-occur throughout the program to make the virtual attendees feel included during breaks or while in-person attendees are changing meeting rooms or at meals.

And don’t forget about the time zones that your virtual attendees will be joining from when you design your program! It’s hard to stay engaged in the middle of the night.



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