Collaborate
for success in
a hybrid world

about

A B O U T [C U R V E]{.pink}

FOUNDED IN 2017, we're an organisation of expert facilitators and coaches. We work with the leadership teams of global organisations to reframe their challenges, develop their leadership abilities, and empower the people around them to collectively create change. Through our workshops and team coaching programmes, we help our clients create new ways of working, build happy and high-performing teams, and master skills in facilitation, co-creation, innovation and leadership.

ABOUT YOU

ARE YOUR teams struggling to collaborate effectively in today's hybrid world? If so, you're not alone. Leaders we work with at organisations as diverse as HSBC, Accenture and Bang & Olufsen are finding it hard, too. The challenges our clients face when some of their people are in the office and some are contributing remotely include lower engagement, lack of focus and fractured teams that leave people feeling excluded or resentful towards others. The good news is, hybrid collaboration can work brilliantly as long as you understand the complexities and you're equipped with the skills and tools to do it well.

ABOUT THIS GUIDE

WE'VE TAKEN the content in this guide from our book, <u>Closer Apart: How to Design and Facilitate Brilliant Workshops Online</u>, our <u>Facilitating Hybrid Collaborations</u> training workshop and our <u>Facilitating Workshops Online</u> self-paced course on Thinkific. Written by Curve co-founders Lizzie Shupak and John Monks, our book and courses are the result of decades of experience facilitating in-person, online and (in recent years) hybrid workshops and collaboration sessions.

Packed with practical tools, expert tips and invaluable advice, they've helped hundreds of leaders and facilitators to collaborate for great results. We've produced this guide to help you run successful hybrid collaboration sessions and overcome some of the challenges of managing teams in a hybrid world.

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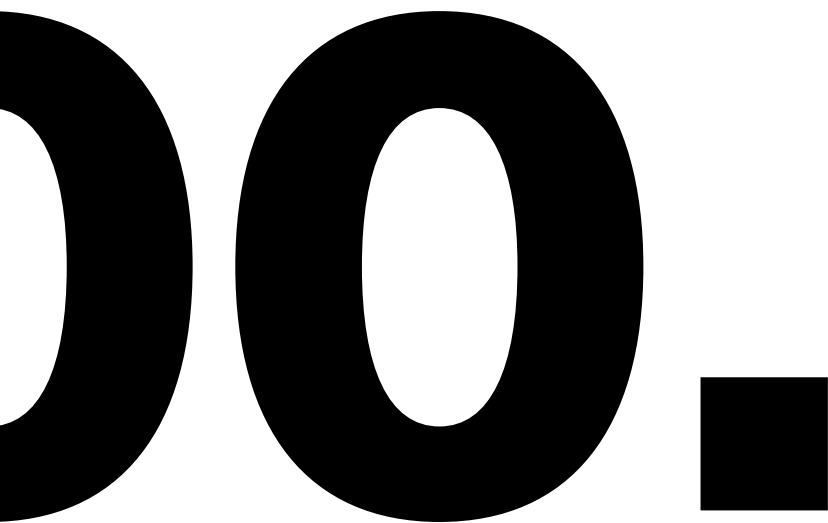
PART ONE:

**How to deliver a seamless
collaboration session**

01.

Connect

CREATE CONNECTION FROM THE START

■ It's vital to establish human connection for any kind of collaborative work. If time is limited, do a quick emotional check-in at the start of your session by asking everyone to rate how they're feeling from 1 to 10 with their fingers. This allows people to bring their whole selves to the session and will build empathy.

■ If you have 30 minutes or more, another icebreaker exercise to build connection and trust is to ask each person to share something personal with another participant. This could be a moment of joy they've experienced this week or something new they've learned this year. This helps people feel appreciated for being a person, not just a job title.

TAKE CONTROL OF THE TECHNOLOGY

■ To avoid wasting time searching for headphones, removing background noise or sorting out technology glitches once you've started, talk to each individual as they enter the room (the physical room or the online platform) and make sure their set-up is working. Factor in an extra 10 minutes' buffer time for this on your agenda.

■ Ask everyone entering the physical room to log in to Zoom or whatever platform you're using, plug in their headphones, set themselves to mute, turn off sound on their computer, access Mural, Miro or other collaborative workspace, and open the agreed communications platform, eg WhatsApp. It's much more inclusive if everyone in the physical room joins any break-out rooms digitally.

■ Have your co-facilitator invite the remote participants to access the collaborative workspace, check their sound and video quality. Sound is the most influential factor when it comes to remote participants feeling included and able to contribute. It's worth investing in a microphone for the people attending in person, to make sure everything they say can be heard by people joining online.

01.

behave

MANAGE PARTICIPANT BEHAVIOURS

IN-PERSON PARTICIPANTS
Ask people to project their voice and speak clearly. They can practise this during the icebreaker. Ask that no two people speak at once and that no conversations happen in the background.

REMOTE PARTICIPANTS
Ask people to comment, ask questions and report any difficulties via the Chat function. That way you can address issues straight away rather than find out the collaboration was unsuccessful at the end. Assign a participant to respond to Chat messages and share instructions for exercises.

ALL PARTICIPANTS
Encourage everyone to mute apps on their phone and close non-essential windows on their screen. Explain that resisting distraction from attention-stealing technology is vital for collaboration. Ask all participants to raise a physical or virtual hand if they'd like to speak. This stops in-person voices from dominating the conversations and prevents people speaking over each other, which makes it hard for the remote participants to hear. If in doubt, default to always asking someone online to contribute first, to emphasise that attending online is just as valid as in person.

SET UP YOUR BREAKOUT GROUPS

■ When you create hybrid breakout groups, ask the in-person participants to move to a different space and gather around one of their laptops. If space is limited, ask them to plug in their headphones instead and take their laptops to where they can clearly hear their group online. Both options will eliminate noise from background conversation. You'll save time if you determine breakout group formations and whose laptop will be shared beforehand.

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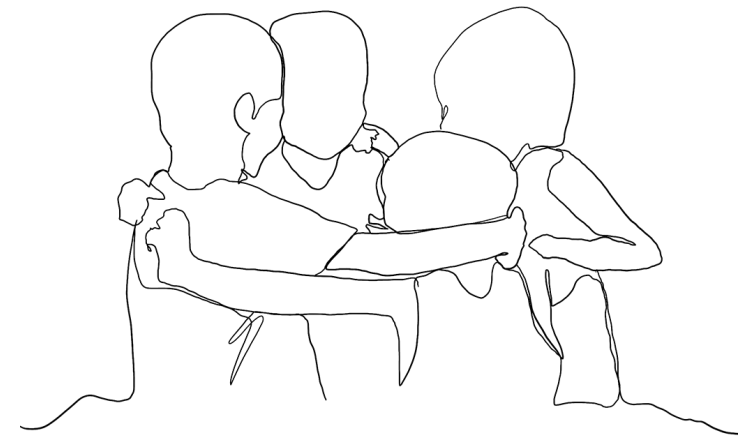
LIZZIE SHUPAK

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DECIDE WHERE TO COLLABORATE AND COMMUNICATE

ONE OF the many challenges of running hybrid collaborations is making sure everyone has access to the same content. This could be work done in the session or come from conversations that took place inside or outside of the physical room.

- Consider how and where to capture instructions, outputs and ideas. The easiest way to do this, especially when working with clients, is through the video platform's Chat function. Everyone can access them here and you'll avoid challenges around privacy or security restrictions.

- If you're using a collaborative workspace, choose one that's easy to access and use, such as Mural. Avoid physical whiteboards and sticky notes if you can – remote participants will struggle to see the text and you'll create an extra task to write it all up and share online.

- Make sure everyone can access and feel comfortable using the Chat function by posting a question like 'What is your energy level this morning?'

## DEFINE WAYS OF WORKING AND OBJECTIVES

- For collaboration to work well, everyone needs to feel confident in contributing ideas. Asking each person to share their objectives at the start of the session gives equal importance to all objectives. Everyone will be aligned from the start, you'll avoid the frustration of unmet objectives at the end, and the group will have a clear vision and purpose to help them stay focused on the task ahead.

- Encourage positive behaviours that support collaboration by asking your group how they want to work during the session. They might propose active listening, asking questions and encouraging diversity of thought – all essential for brilliant collaborations. Ask them how they want to stay focused in the physical and digital spaces. Remote participants will be more easily distracted, so remind them to put phones on silent, close non-essential windows and switch on an autoreply.

01.

TAKE CARE OF PARTICIPANT NEEDS

TO COLLABORATE well, everyone needs to be able to communicate easily and clearly with each other and feel comfortable and supported in contributing their best ideas. The way to respond to these same needs is different for in-person and remote participants. Refer to this simple checklist as you design your collaboration to make sure everyone's needs are met:

ALL PARTICIPANTS

- access to individual laptops, the video platform, collaborative workspace and the communication channel so everyone can collaborate and the group feels united
- great sound quality online and a microphone in the physical room so all participants can hear each other clearly
- refreshments and snacks for energy

- a room with windows – natural light has a huge positive impact on energy wherever you are
- access to outside space if possible, which might need whole-building access cards for in-person participants
- headphones for in-person participants to plug into laptop during breakout sessions and for remote participants to eliminate any local background noise
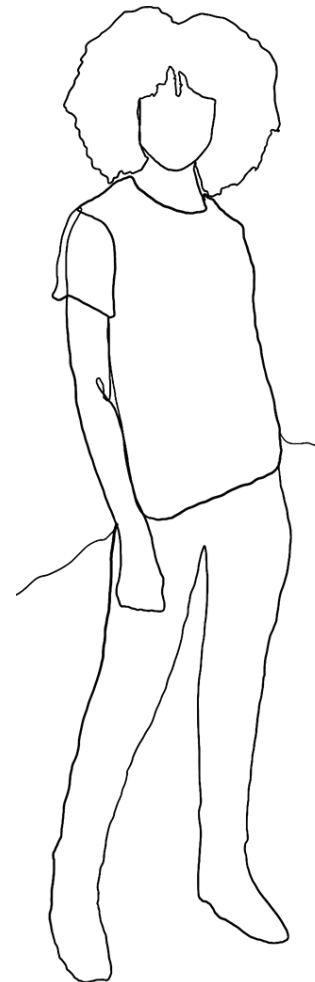
LIZZIE SHUPAK

IN-PERSON PARTICIPANTS

- physical name tags for so that everyone in the in-person group can refer to each other by name
- comfortable and moveable seats so that the group can stay close to the camera or move to different parts of the room for breakout sessions
- the right room temperature – too hot and participants feel drowsy, too cold and they'll be distracted trying to stay warm
- access to worksheets and resources beforehand, or a printer

energy

KEEP EVERYONE ENERGISED

■ Your team's energy level has a huge impact on the quality of their collaborative work. Physical exercise and fresh air are important, but how easy is it for different people to access these? Do those with impaired mobility need extra time to leave and re-enter their building? Can you include physical exercises for seated as well as standing positions?

■ Make sure remote and in-person participants can experience the same benefits. During coffee breaks, for example, in-person participants will often gather for water-cooler talks. So that they don't miss out, encourage the remote participants to message someone in the physical room if they fancy having a chat or have a comment or question they'd like to share.

■ Use a game like Virtual Mirror to energise the group. You'll keep everyone engaged and you only need to issue one set of instructions. A guided meditation or activity doesn't work as well with in-person facilitators as it's harder for remote participants to see and hear the instructions.

01.

HOW TO RUN 'VIRTUAL MIRROR'
■ **Ask everyone to stand up**
■ **Tell them you'll invite one person to perform a physical movement for 10 seconds and everyone else has to copy their action**
■ **When the 10 seconds are up, that person chooses someone else to do a different physical exercise**
■ **Stop the game after 5 rounds**

02.

PART TWO:

How to choose the collaboration
archetype for your goal

Collaboration isn't one single activity; we group it into three different forms. As a facilitator, you need to determine which one you need for specific tasks and teams so you can design the best environment and exercises to achieve your goal.

Intuitively, people feel their best collaboration comes from working with like minds; it feels easier and more fun but we know, and science shows, that the best ideas come from diversity. It's down to you to figure out how to help people combine their very different thoughts and experiences. Done badly, you end up with conflicts and clashing. Done well, you produce brilliant work.

02.

	COLLABORATE TO CREATE	COLLABORATE TO COMPLY	COLLABORATE TO COMPETE
DEFINITION	Anything that requires the group to come up with new and original thinking.	The goal is to achieve quality and consistency.	The priority for this collaboration type is shipping' and often occurs when there's a competitive task to complete.
EXAMPLES	A new idea for a product, service or campaign, writing a new document or mapping a new process.	A repeatable process or element of a team's workflow, or a bigger challenge like 'how can I move my team entirely online and minimise the loss of productivity?'	Responding to a pitch or reacting to a real-time crisis or opportunity.
ROLES	It can be helpful to encourage people to take on specific roles such as thinking about the big ideas or the tiny details. The only hierarchical role you need for this type of collaboration is a strong leader who can make sure energy levels stay high, everyone stays focused on the goal, and everyone gets a turn to contribute.	Defined roles are extremely helpful for this type of collaboration, providing structure and hierarchy so that everyone knows what they're doing and feels secure, confident and empowered. Example roles are decision-makers, knowledge or skills specialists, people managing execution and quality control, and people focused on research, data or validation of the work being done.	Without a decision-maker on hand for this collaboration type, you're likely to waste valuable time and energy. It's important that everyone understands what their job is and that there's no duplication or overlap. It can be useful to have someone act as a pacemaker who is sensitive to the people in the group and their emotions, and to the work that's being done.
CONTENT	Organisational hierarchy can get in the way of people contributing ideas so avoid referring to job titles and use exercises that encourage everyone to contribute. The high noise level that often comes with creative collaboration can feel chaotic for some, so start with exercises that loosen everyone up and help them feel comfortable speaking; ask questions such as 'What's the worst idea?' Introduce as much stimulus as possible to help people expand their thinking. Using external voices, articles or images can help avoid lazy and habitual approaches.	Ideally you want people to feel relaxed and experience what psychologists call "flow". You also need clarity on ways of working and process. Everyone needs to understand how the team fits together; who they depend on and who depends on them. This type of collaboration involves high levels of concentration so can be quite draining on your team's energy, especially for remote participants. Give opportunities for breaks and encourage people to get fresh air. Healthy snacks are great for boosting energy. Send your remote participants a list of items to buy so they can enjoy the same snacks and feel included.	Make sure participants have all the resources they need, such as specialist expertise or access to specific tools. When collaborating to compete, the group needs a high level of energy. Invite them to go outside or do some physical exercise - it may feel as though you're wasting precious time but the extra endorphins will help them perform better.
WORKSPACE AND PROPS	For hybrid collaboration to be inclusive and encourage creativity, we suggest using software like Mural. Everyone can see and contribute to the workspace which means the collaboration won't be negatively impacted by proximity bias. Mural is also a colourful and energising workspace and supports the use of images, making it easier to combine ideas.	For this type of collaboration everyone needs to have easy access to the tools they need, such as shared documents and folders, project management software and communications tools.	To help people communicate with each other both practically and emotionally you can use different channels and threads to manage different kinds of communication and information transfer. One of the key props for this kind of collaboration is a visible countdown to the deadline. It's hard to sustain this kind of energy indefinitely, so having a clear target makes a big difference.

02.

03.

PART THREE:
How to overcome the
challenges of a hybrid workforce

03.

Research has shown that remote workers are as productive as in-person workers. But when a team perceives remote workers as less productive, they put in less effort, which negatively impacts their team's performance. Remind people to be conscious of in-office biases so that they can work against them.

03.

engagement

OVERCOME PRESENCE BIAS

(THE BELIEF THAT REMOTE WORKERS ARE LESS PRODUCTIVE)
Research has shown that remote workers are as productive as in-person workers. But when a team perceives remote workers as less productive, they put in less effort, which negatively impacts their team's performance. Remind people to be conscious of in-office biases so that they can work against them.

- Define clear roles and targets so that people are judged by the quality of their outputs rather than whether they're present in the office.

- Put clear systems in place to help managers gauge how employees are progressing without interrupting their flow or micro-managing.

INCREASE ENGAGEMENT

- Use a communications platform to capture water-cooler conversations so that remote participants can get involved in ideation and joining the dots.

- Remote workers often switch directly from one meeting to another which can drain energy and make it harder to engage. Try to make time and space for the group to centre themselves on the work and the people they're collaborating with.

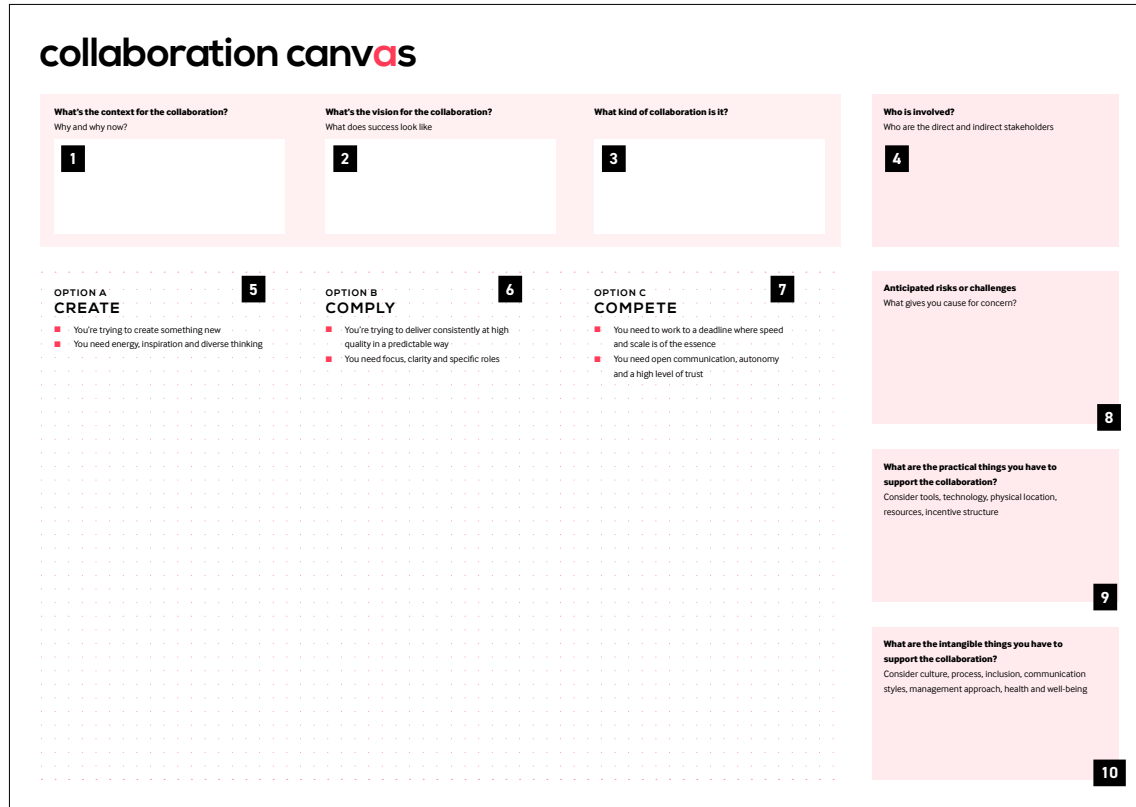**03.**

social

CREATE OPPORTUNITIES TO SOCIALISE

- Add team socialising time into calendars so the group can connect as individuals. Do this during work hours so that remote workers don't feel they should stay online for longer in order to feel part of the team.

- Organise in-person events solely for socialising. Collaborative work is often more productive when the team is remote, but human connection works better when a group gets together face to face.

CAPTURE AND SHARE IMPORTANT INFORMATION

- Create threads for specific projects in your collaboration workspace. Make sure there are threads for different purposes including 'casual conversations' or 'random ideas'.

- Be clear upfront on how you want people to use these streams so they feel comfortable sharing their thoughts, and encourage them not to censor their thinking – all ideas can spark collaboration!

- Voice-record or take minutes of all collaboration sessions. Getting into this habit means anyone who was unable to attend can stay involved and you can capture all important information.

03.

THE CURVE COLLABORATION PLANNING CANVAS

collaboration canvas

What's the context for the collaboration?
Why and why now?

1

What's the vision for the collaboration?
What does success look like

2

What kind of collaboration is it?

3

Who is involved?
Who are the direct and indirect stakeholders

4

OPTION A
CREATE
5
- You're trying to create something new
- You need energy, inspiration and diverse thinking

OPTION B
COMPLY
6
- You're trying to deliver consistently at high quality in a predictable way
- You need focus, clarity and specific roles

OPTION C
COMPETE
7
- You need to work to a deadline where speed and scale is of the essence
- You need open communication, autonomy and a high level of trust

Anticipated risks or challenges
What gives you cause for concern?

8

What are the practical things you have to support the collaboration?
Consider tools, technology, physical location, resources, incentive structure

9

What are the intangible things you have to support the collaboration?
Consider culture, process, inclusion, communication styles, management approach, health and well-being

10

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1 PURPOSE
Clarify where the need for this collaboration has come from. The focus is on the past.

2 VISION
Looking forward now, what does success look like? What do you need this collaboration to achieve for the whole group?

3 WORK DONE SO FAR
Document previously completed relevant work to avoid duplication and identify resources that will be useful for the collaboration session.

4 WHO WILL ATTEND? AND HOW?
Write down the names of everyone who will take part and whether they will be attending physically or remotely.

What kind of outcomes must your collaboration produce? Bear in mind that many teams will go through a variety of types of collaboration in their work together, but start by thinking about the immediate goal.

5 CREATE
Are you trying to create something new? If so, you'll need inspiration, access to diverse sources of data, high energy and an inclusive environment that encourages everyone to share their thinking.

6 COMPLY
Are you going for quality, consistency and compliance with a specific standard or framework? If so, you'll need a steady pace, clear guidelines, roles and technology or an environment that helps you focus and attend to the details.

7 COMPETE
Are you competing or working towards a tight deadline? If so, you'll need clear and direct channels of communication, confidence and trust in your peers and ensuring that everyone is playing to their strengths, empowered to make decisions with clarity of what's expected of them, when, and how it affects other members of the team.

8 ANTICIPATED RISKS AND CHALLENGES
Document the factors that carry uncertainty. In hybrid collaborations, technology is almost always on this list, but it might also be a particularly tricky character, a difficult commercial context, or the fact that someone on the team is off sick. Anything that bothers you – note it down.

9 PRACTICAL REQUIREMENTS
Think about the practical aspects of the collaboration. How will you work together? What technology will you use? Do you have all the resources you need to be successful? Are there any additional stakeholders you need to involve? How will you keep people motivated and focused?
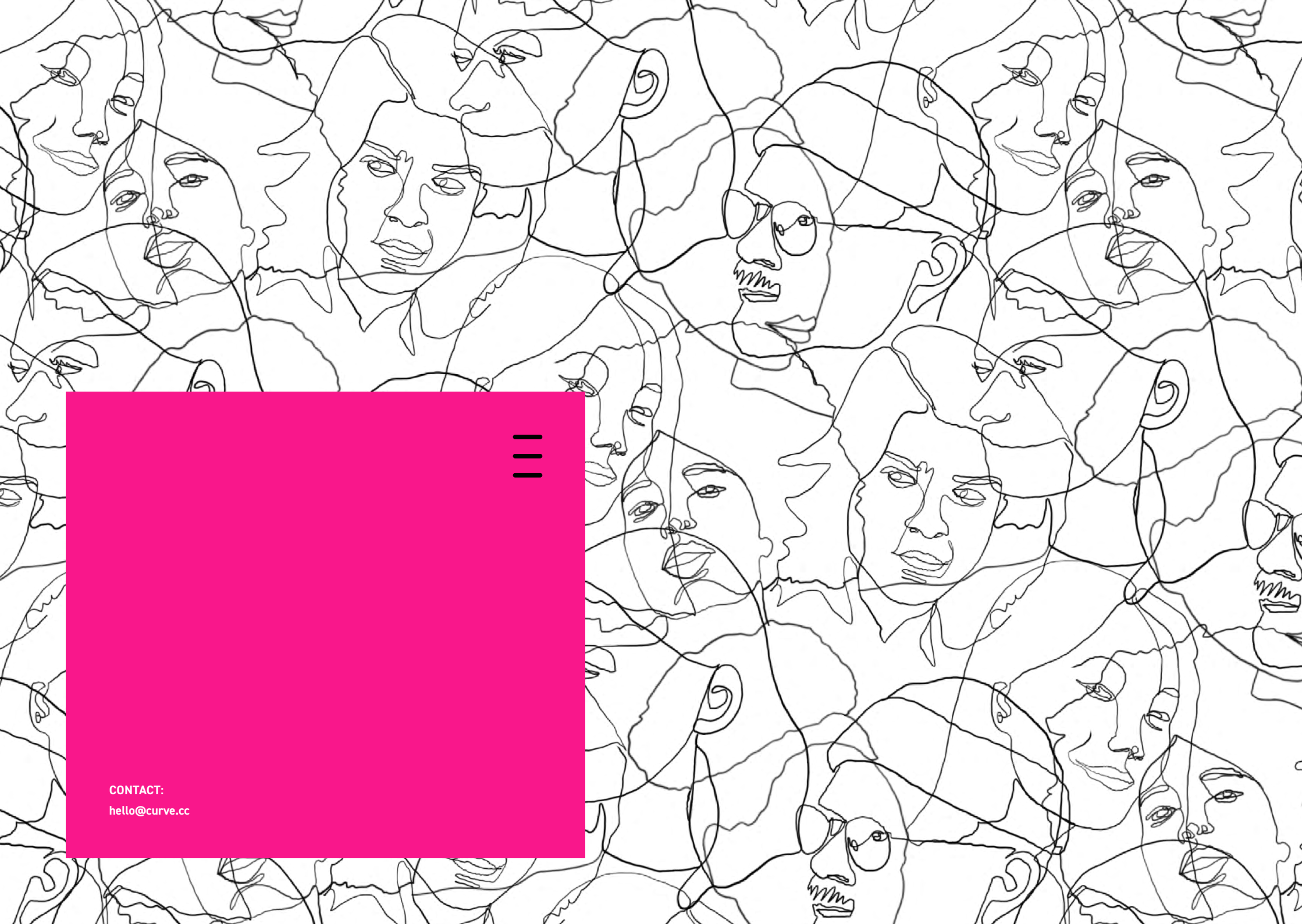
10 INTANGIBLE REQUIREMENTS
Think about the intangible aspects of the collaboration. Does everyone feel confident to be successful? Do you trust each other? Do you have shared values or assumptions about the collaboration? How will you manage feedback or difficult conversations?

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AMAL MAJAVONIC / UNSPLASH

WHAT NEXT?

■ Visit our website to find out more about who we are and what we do

■ Read our book, Closer Apart: How to Design and Facilitate Brilliant Workshops Online
"Closer Apart is comprehensive, witty and bursting with the kinds of everyday hacks I'm after. Most importantly, as with everything Lizzie and John do, there is a fiercely human, holistic perspective that shoots through its every pore."
Jack Fryer, Managing Director at Universal Music.

■ Book your place on our in-person Facilitating Hybrid Collaborations training workshop.

■ Take our Facilitating Workshops Online self-paced course on Thinkific.

■ Talk to us about our bespoke facilitation and team coaching programmes, training workshops, leadership skills masterclasses and team offsites and leadership retreats. Email us at hello@curve.cc
"Curve understands what responsible and effective leadership looks like in the 21st century and beyond. They give you tools and techniques that can be used again and again to fix organisational structure and bring people together to problem solve and co-create."
Jenny Varley, CEO at FlinkWorks and former Head of Communications at HSBC

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