

# Workshop Guide

## 1. Define the Workshop Objectives & Scope

- ✓ Clarify the Goal – What is the purpose of the workshop? (e.g., gathering requirements, designing solutions, brainstorming ideas).
- ✓ Set Clear Expectations – Define the outcomes you expect to achieve (e.g., a list of prioritized features, a process map, a list of potential solutions).
- ✓ Scope the Content – Decide the specific topics or challenges to focus on during the workshop.

## 2. Plan the Workshop Logistics

- ✓ Select Participants – Invite key stakeholders, subject matter experts (SMEs), and decision-makers who can contribute valuable insights.
- ✓ Choose the Right Format – Decide if it will be a face-to-face or virtual workshop (consider tools like Zoom, Miro, Microsoft Teams).
- ✓ Choose the Duration – Determine the ideal duration for the workshop based on the scope of the content (e.g., 1 hour for quick brainstorming or half-day/full-day for in-depth discussions).
- ✓ Prepare the Agenda – Create an agenda outlining the topics, activities, and time allocated for each. Example agenda:
  - Welcome & Objectives (15 minutes)
  - Introduction & Icebreaker (15 minutes)
  - Presentation of Current Issues/Context (30 minutes)
  - Group Discussion/Activity (1-2 hours)
  - Summary & Next Steps (15 minutes)
- ✓ Prepare Workshop Materials – Gather any materials or tools needed for the workshop (e.g., presentation slides, process maps, whiteboards, sticky notes, online collaboration tools).

## 3. Facilitate the Workshop

- ✓ Welcome Participants & Set Expectations – Start by introducing yourself, the purpose of the workshop, and the expected outcomes.
- ✓ Engage Participants – Begin with an icebreaker activity to encourage participation and build rapport.
- ✓ Present the Context – Provide background information or data to set the stage for discussions (e.g., current challenges, process gaps, user feedback).
- ✓ Use Interactive Techniques – Encourage active participation using techniques such as:
  - Brainstorming – Generate ideas or solutions.
  - Group Discussions – Facilitate conversations to understand varying perspectives.
  - SWOT Analysis – Evaluate the strengths, weaknesses, opportunities, and threats of a given idea or solution.
  - Voting/Prioritization – Use tools like dot voting or affinity diagrams to prioritize ideas or solutions.
- ✓ Monitor Group Dynamics – Ensure everyone participates and keeps the conversation focused on the objectives. Intervene if necessary to prevent domination by a few voices.
- ✓ Use Visual Aids – Utilize whiteboards, flip charts, or digital tools to map ideas, processes, and discussions in real-time.

## 4. Capture and Document Key Insights

- ✓ Record Discussions – Take detailed notes or record key points, decisions, and action items.
- ✓ Use Visuals – Create diagrams, process maps, or flowcharts to represent the outputs visually.
- ✓ Summarize Key Decisions – Highlight the most important outcomes (e.g., agreed-upon solutions, prioritized tasks).

## 5. Close the Workshop & Define Next Steps

- ✓ Summarize Key Takeaways – Recap the main outcomes, solutions, or decisions made during the session.
- ✓ Define Action Items – Clearly outline the next steps, including who will be responsible for each action and the deadlines.
- ✓ Get Feedback – Ask participants for feedback on the workshop format and content to improve future sessions.
- ✓ Thank Participants – Express gratitude for their time and contributions.

## 6. Post-Workshop Activities

- ✓ Distribute Workshop Summary – Send out a formal summary report of the workshop, including:
  - Key decisions made
  - Action items and owners
  - Any additional resources or materials
- ✓ Follow Up – Check in with participants on the progress of action items and provide any necessary support.
- ✓ Document Insights – If needed, formalize any solutions, process maps, or requirement specifications derived from the workshop.

## Tips:

- Be Neutral – As a facilitator, avoid pushing your own ideas. Encourage open discussion and diverse opinions.
- Be Flexible – If the group is moving in an unexpected but valuable direction, adjust the agenda as necessary.
- Keep It Engaging – Use group activities, sticky notes, or interactive tools to keep the participants engaged.
- Stay on Track – Ensure the discussion remains focused on the goals of the workshop. Redirect if the conversation strays too far off-topic.
- Time Management – Respect participants' time by keeping discussions focused and within the scheduled time frame.