



# HOW TO RUN A WORKSHOP

**A FREE step-by-step Guide  
to help you:**

- Prepare**
- Facilitate**
- Ideate**
- Document**
- Close**
- Sustain Success**

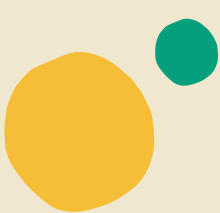
# HOW TO PREPARE A WORKSHOP

8 hours of preparation for every  
1 hour of workshop time will help  
you be organized and effect



## WHAT IS THE GOAL?

What is the workshop's goal? Why are these attendees being asked to attend? What is expected from them?



## WHAT IS THE CALL TO ACTION?

What is the problem or the innovation needed?



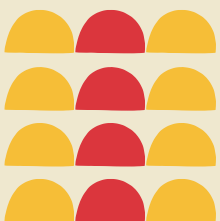
## WHO IS THE SOLUTION FOR?

Define the persona or user that will benefit. What is the situation today and what is the aspiration for the future?



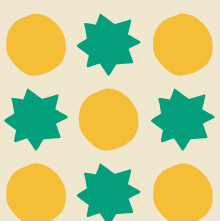
## WHAT DATA EXISTS?

What research related to the problem has been done, how will it be presented? What are the assumptions?



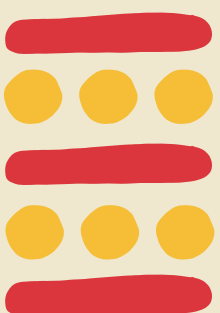
## WILL THE TEAM USE TOOLS?

Will the team need methods, models or tools to do their work? Assess what is needed based on the topic.



## ARE THERE WORK PRODUCTS TO REVIEW?

Are their current state documents, processes or products needed for the team to reference? Is their customer or user feedback as input to the review?



## HAS THE FACILITATION TEAM BEEN ASSIGNED?

It takes a team to create a successful workshop. Make sure you have the right team in place and they understand their roles and are prepared.



## HAS THE SPONSOR SIGNED OFF?

Make sure your approach, tools, attendees and overall plan are reviewed and agreed with your sponsor. Ensure they understand your direction for the workshop and why that approach will be used to support your Call to Action.

# HOW TO FACILITATE A WORKSHOP



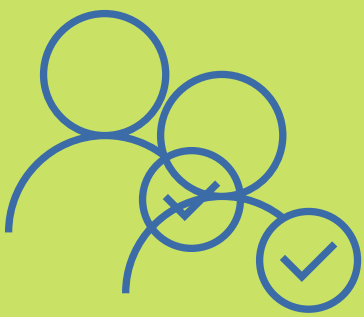
## **BEGIN WITH CLARITY**

The Facilitator provides the Call to Action and the Workshop outcome. Define the scope and decisions needed.



## **REVIEW THE DATA**

What is already known about the situation. What subjective and objective data can be reviewed. Make it visual.



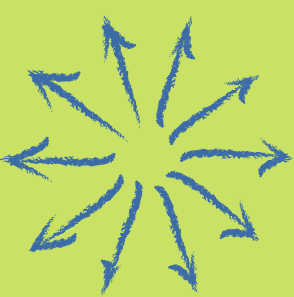
## **GET EXPECTATIONS**

Start with asking for participants expectations and concerns to get issues out on the table - and address them.



## **USE WORKING GROUPS**

Use table teams or virtual teams to work in teams on a specific topic or to allow each member to share ideas.



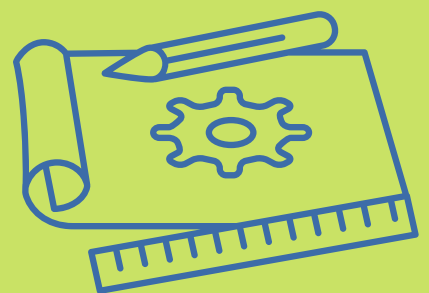
## **MIND MAP**

Work ideas into flows, group similar, complementary and challenging ideas into complete concepts.



## **BUILD THE OUTCOME**

Create the solution based on your team work (use the right tool based on the workshops focus).



## **DOCUMENT OUTCOMES**

Continue sharing the Solutions story, goal, and impact of the workshop. Make the Participants ambassadors.

# HOW TO IDEATE A WORKSHOP WITH DESIGN THINKING

## EMPATHISE

UNDERSTAND WHO YOUR DESIGNING FOR AND THEIR SITUATION, FRUSTRATIONS AND FEELINGS. ESTABLISH THEIR NEEDS AND WANTS.

STEP 01



## DEFINE

DEFINE THE PROBLEM CLEARLY. MAKE SURE YOU HAVE THE REAL PROBLEM, NOT A SYMPTOM OR PERCEIVED ISSUE. CHECK WITH THE USERS TO CONFIRM THE PROBLEM STATEMENT(S).

STEP 02



## IDEATE

BRAINSTORM WITHOUT JUDGING. DOCUMENT EACH IDEA SEPARATELY. AFTER A ROUND OF BRAINSTORMING, GROUP SIMILAR OR COMPLEMENTARY IDEAS. CHALLENGE ASSUMPTIONS. CHECK IDEAS AGAINST THE PROBLEM STATEMENT. MINDMAP THE SOLUTION. SELECT THE BEST SOLUTION FOR PROTOTYPING.

STEP 03



## PROTOTYPE

MAKE A SIMPLE MOCK UP ON PAPER. WALK THROUGH A USE CASE. CREATE A STORYBOARD. REFINE AND DOCUMENT ASSUMPTION AND QUESTIONS TO ADDRESS.

STEP 04

HUMAN UTILITY

TECHNOLOGICAL FEASIBILITY

Economic Viability



## TEST

TESTS FOR ALL ASPECTS OF THE PRODUCT. LOOK FOR INTENDED AND UNINTENDED OUTCOMES. MAKE IT REAL: INCLUDE PROCESSES AND CUSTOMER EXPERIENCES FROM END TO END TO ENSURE THE SOLUTION ADDRESSES THE PROBLEM.

STEP 05



## ITERATE

REVIEW THE PROTOTYPE AND IMPROVE OR BUILD OUT AND TEST AGAIN. PLAN CONTINUOUS IMPROVEMENT THROUGH OUT THE LIFE OF THE PROJECT OR PRODUCT.

STEP 06

# HOW TO DOCUMENT

## A WORKSHOP

*From User to Solution*



*Our User*

*Has a Problem*

*The Solution*

*The Outcome*

*Points to Test*

# HOW TO CLOSE

## A WORKSHOP

How you Close and what happens next will be create the Workshop legacy.



### REVIEW THE CALL TO ACTION

What was the workshop's goal? How was it addressed?



### REVIEW THE OUTCOME

What solution was recommended? What ideas were used?



### RE-LIVE THE DAY IN THE LIFE OR STORYBOARD

Roll play the day in the life starring the users. Create a lasting impression of the outcome and the impact.



### SUMMARIZE THE COMMUNICATION

Share the message you hope attendees will take back on the project



### DEFINE THE PARTICIPANTS NEW ROLE

Ask Users and other attendees if they will take on the role of ambassador or tester.



### COMPLETE THE CHECK LISTS

Review the Objectives and Concerns the participants discussed at the start of the workshop. Ensure they are addressed.



### THANK THE ATTENDEES

Personnally and publicly thank all attendees for their effort and time.



### CELEBRATE

End with awards for key roles, celebrate with cake or another appropriate thank you. Use the time close on a high which gives workshop members time to talk.

# HOW TO SUSTAIN WORKSHOP SUCCESS

The day of the workshop is key, but success is also about what comes afterwards.

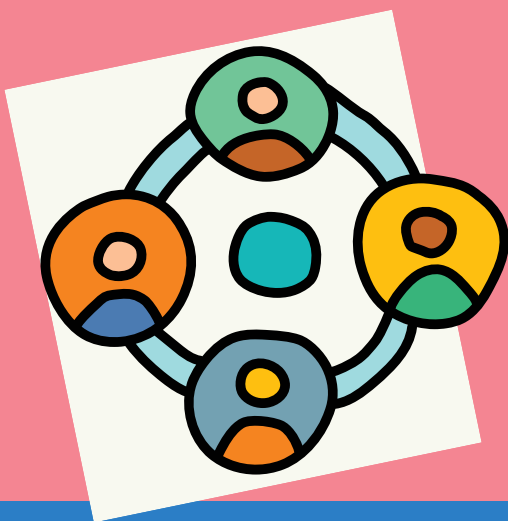
Sustain the success by following these steps.



## Document the Work

Take photos of the work done, notes and drawings. Update your digital systems (Trello, etc).

Put the Key documents on the walls in the Team room for inspiration and reference.



## Create a Communication Plan

Keep the Goodwill through effect and consistent communication. Share the process, ask for help with new issues or clarifying questions.



## From Workshop Participants to idea Ambassadors

Your workshop Participants can continue to add value by becoming informal ambassadors of the idea. Sharing the key messages within the organization – spreading the goodwill for the project or idea.



### Make a Workshop PlayBook

Don't recreate the wheel every time. Once you have success, document your process in a way that you can use it again and again. Share it with others to show your ability to influence the best practices inside your organization.



### Create Lessons Learned

As you build your Workshop way of working, document lessons learned with your team. Improve the approaches and tools used.

Give your team a chance to grow in their roles by taking new facilitation activities in future Workshops.