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# Workshop Planning Template

This template makes the process of planning a workshop easier by laying out clearly each step to be covered. It is divided into **five meetings, each lasting an hour.**

* Sharing a vision
* Defining the agenda
* Refining the agenda
* Briefing the team
* Collecting learnings

# Part 1 - Sharing a vision

The first session in this series is a meeting of client, facilitator and, if applicable, their teams, to start visioning the future workshop. Use the accompanying blueprint to help you set boundaries as well as establish intentions to guide the design.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | energizer/icebreaker |  | content |  | discussion/debriefing |

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| --- | --- | --- | --- | --- | --- | --- | --- |
| Time | Length |  | Title | Description | Additional Info | Goals | Materials |
| 09:00 | 5m |  | **Introduction** | Explain the purpose of the meeting and run through the agenda for today. | The facilitator illustrates the reason for calling this meeting and runs through the **agenda**. | Clarity on purpose and scope of the meeting | * Whiteboard to take notes on * Blueprint/canvas with key topics |
| 09:05 | 5m |  | **Check-in** | Who is in the room? | Start by **introducing yourself** as facilitator and ask for a **round of names, roles** and each person's connection to the future workshop. | Ensure everyone is on the same page as to who is who |  |
| 09:10 | 5m |  | **Context and non-negotiables** | What elements of the workshop are already clear, known, and cannot be changed? | First of all, collect **data on what is known about the workshop.** It might be, for example, the date or the title. | Establish the boundaries of the future workshop design | * Whiteboard to take notes on * Blueprint/canvas with key topics |
| 09:15 | 10m |  | **Ladder of engagement** | Share information on the ladder of engagement and ensure you are all on the same page as to where the workshop sits. | Having introduced the idea of a ladder of engagement/participation and explained why it's important for you to know more about this, invite a free-flowing discussion on where the workshop sits and take notes in the blueprint.  It is important to explain that **different degrees of participation are valid as long as the objective is clear to all parties involved.** | Continue to clarify the limits of the design | * Slide with ladder of engagement |
| 09:25 | 10m |  | **Defining tangible outputs** | What should be the deliverables from this workshop? Is it a report, a set of decisions...? | Next, ask participants to focus on what the **intended output** from the workshop is. Take notes on the blueprint. | Define tangible outputs for the workshop | * Whiteboard to take notes on * Blueprint/canvas with key topics |
| 09:35 | 15m |  | **Brainstorming intangible outputs** | Reflect and share the intangible outputs of the workshop. Individual reflection followed by sharing. | How do you imagine people feeling and behaving as a consequence of this event? Invite each person to consider what would the **immaterial, emotional, "soft" outputs** and take separate notes on sticky notes. Cluster them and discuss. | Getting a sense of the intangible and emotional feel of the workshop | * Whiteboard to take notes on * Blueprint/canvas with key topics * Sticky notes (or virtual ones) |
| 09:50 | 5m |  | **Intentions for the workshop** | Invite everyone to share in a round what their high hopes for the event are | To move towards closing, ask everyone to share in a round three words or a short sentence **summarizing their intention** and high hopes for the workshop. | Set intentions, encourage alignment and collaboration |  |
| 09:55 | 5m |  | **Next steps & closing** | Thank everyone, and remind them you will be using the information they provided to create an initial concept note. | Share the date by which you will be sending your first ideas and concept note for the workshop.   Check if **any other practical/administrative** detail needs to be brought to attention, including signing contracts, agreements and/or a memorandum of understanding (MuO). | Closing and clarity on next steps |  |
| 10:00 | 0m |  | **What happens after - FOLLOW-UP** | After this workshop, the facilitator drafts an initial concept note and shares it with the client for feedback and approval. | Once the concept for the workshop is defined, the facilitator (and, if applicable, their team) moves to Part 2 - Drafting the agenda.   For more details on workshop planning, refer to SessionLab's [Step-by-step guide to planning a workshop.](http://www.sessionlab.com/blog/planning-a-workshop) | Next steps |  |
| *10:00* |  | |  |  |  |  |  |

Total length: 1h 00m

### Materials:

* Whiteboard to take notes on x 4 in Introduction | Context and non-negotiables | Defining tangible outputs | Brainstorming intangible outputs
* Blueprint/canvas with key topics x 4 in Introduction | Context and non-negotiables | Defining tangible outputs | Brainstorming intangible outputs
* Slide with ladder of engagement in Ladder of engagement
* Sticky notes (or virtual ones) in Brainstorming intangible outputs

# Part 1 - Sharing a vision - block details

## Introduction

09:00 | 5m

Explain the purpose of the meeting and run through the agenda for today.

### Additional Information

The facilitator illustrates the reason for calling this meeting and runs through the **agenda**.

### Materials

* Whiteboard to take notes on
* Blueprint/canvas with key topics

### Goals

Clarity on purpose and scope of the meeting

### Instructions

Show the template and explain that we will be collecting ideas and information in order for you to create a first design for the workshop.  
  
**A ready-made blueprint** is in the attachments! You can print it out before the workshop or copy it onto a virtual board.

## Check-in

09:05 | 5m

Who is in the room?

### Additional Information

Start by **introducing yourself** as facilitator and ask for a **round of names, roles** and each person's connection to the future workshop.

### Goals

Ensure everyone is on the same page as to who is who

### Instructions

This meeting could hypothetically be attended by only two people: a facilitator and their client. More frequently, **there will be a small group of people attending,** including two or three staff from the client's offices, someone who will be responsible for communication, and maybe any co-facilitators or facilitation team members.

At the very beginning, it's good to **establish some trust in the facilitator** and their role. In view of this, you might want to start by sharing:

* a story from a similar project;
* any projects  you have done before for the same (or a similar) organization;
* your credentials;
* your main intention in supporting this group.

## Context and non-negotiables

09:10 | 5m

What elements of the workshop are already clear, known, and cannot be changed?

### Additional Information

First of all, collect **data on what is known about the workshop.** It might be, for example, the date or the title.

### Materials

* Whiteboard to take notes on
* Blueprint/canvas with key topics

### Goals

Establish the boundaries of the future workshop design

### Instructions

Start the discussion by asking first of all to list for you **what elements of the workshop are fixed, set, non-negotiable.**

**Facilitator's notes**

This point is likely to be quite fast. It is a good idea to cover this point first, in order to avoid the risk of later designing something that is not possible to do based on these constraints.

## Ladder of engagement

09:15 | 10m

Share information on the ladder of engagement and ensure you are all on the same page as to where the workshop sits.

### Additional Information

Having introduced the idea of a ladder of engagement/participation and explained why it's important for you to know more about this, invite a free-flowing discussion on where the workshop sits and take notes in the blueprint.  
  
It is important to explain that **different degrees of participation are valid as long as the objective is clear to all parties involved.**

### Materials

* Slide with ladder of engagement

### Goals

Continue to clarify the limits of the design

### Instructions

Show your client an illustration of the **ladder of engagement.** There are many of these online (an example is attached) or you can create your own slide.  
  
The terminology and the number of steps you show can be adapted to the specific context or simplified: what is important is that your client understands tha**t there are different possible degrees of participation** and that you discuss where the workshop sits. This will direct your choices of activities and the communications plan.

Making examples can be very helpful: is this about "deciding together what cake to bake, sourcing the ingredients, and cooking together?" or is it more like "how could I bake a better cake next time"?   
  
It is important to explain that **different degrees of participation are valid as long as the objective is clear to all parties involved.**

Possibly, your client might need some time to think about it, check with management, and come back to you with a clearer answer via email later. That's fine: **the most important thing is to have opened this conversation.**

**When should you NOT have this discussion?**

**This discussion does not apply to training workshops.** If you are organizing a training, simply skip this point or replace it with a discussion on the context of your workshop: is it part of a wider program? Is there already a pattern of how much participants tend to interact with the instructor/trainer?

## Defining tangible outputs

09:25 | 10m

What should be the deliverables from this workshop? Is it a report, a set of decisions...?

### Additional Information

Next, ask participants to focus on what the **intended output** from the workshop is. Take notes on the blueprint.

### Materials

* Whiteboard to take notes on
* Blueprint/canvas with key topics

### Goals

Define tangible outputs for the workshop

### Instructions

Move the group to the next step. Explain that you will be collecting ideas on what will be created as a consequence of the workshop, both tangible and intangible. **Start with tangible outputs.**

Generally, the client will have an idea about this, it's just a matter of **drawing it out and establishing some boundaries** (e.g. number of pages, type of report...). Take notes on the board. If elements emerge that are not physical/tangible, just park them in the appropriate section.

## Brainstorming intangible outputs

09:35 | 15m

Reflect and share the intangible outputs of the workshop. Individual reflection followed by sharing.

### Additional Information

How do you imagine people feeling and behaving as a consequence of this event? Invite each person to consider what would the **immaterial, emotional, "soft" outputs** and take separate notes on sticky notes. Cluster them and discuss.

### Materials

* Whiteboard to take notes on
* Blueprint/canvas with key topics
* Sticky notes (or virtual ones)

### Goals

Getting a sense of the intangible and emotional feel of the workshop

### Instructions

Explain that you will be moving on to more intangible and emotional aspects of the workshop. In order to hear from everyone, suggest that **everyone write their individual ideas on a sticky-note,** then share.

Pose a generative question such as: "How do you imagine people feeling and behaving during this event?"  
  
Invite a couple of minutes of individual reflection. Then open the floor for people to **share something about what they wrote a**nd what they see on the board.

**Facilitator's notes**

Because this is an early input in the design, do not stress if some sticky notes appear contradictory. Explain that you will be working on these as inspiration and that **the design might accommodate different needs.**

## Intentions for the workshop

09:50 | 5m

Invite everyone to share in a round what their high hopes for the event are

### Additional Information

To move towards closing, ask everyone to share in a round three words or a short sentence **summarizing their intention** and high hopes for the workshop.

### Goals

Set intentions, encourage alignment and collaboration

### Instructions

To move towards closing, ask everyone to share in a round **a few words summarising their intention and high hopes for the workshop.** Start with your own!

## Next steps & closing

09:55 | 5m

Thank everyone, and remind them you will be using the information they provided to create an initial concept note.

### Additional Information

Share the date by which you will be sending your first ideas and concept note for the workshop.   
  
Check if **any other practical/administrative** detail needs to be brought to attention, including signing contracts, agreements and/or a memorandum of understanding (MuO).

### Goals

Closing and clarity on next steps

### Instructions

Inform everyone of **the next steps:**

* **the facilitator will send a concept note** and first ideas for the workshop, thanks to all the information provided;
* then, **participants will be invited to provide feedback** on this concept note asynchronously (check with your client who should be part of this email chain);
* the facilitator will **create and share a draft agenda;**
* everyone will be invited back to **a second 1-hour meeting to refine the agenda.**

Check if any other practical/administrative detail needs to be brought to attention, including **signing contracts,** agreements and/or a memorandum of understanding (MuO).

**Thank everyone warmly for their contribution** in shaping the workshop!

## What happens after - FOLLOW-UP

10:00 | 0m

After this workshop, the facilitator drafts an initial concept note and shares it with the client for feedback and approval.

### Additional Information

Once the concept for the workshop is defined, the facilitator (and, if applicable, their team) moves to Part 2 - Drafting the agenda.   
  
For more details on workshop planning, refer to SessionLab's [Step-by-step guide to planning a workshop.](http://www.sessionlab.com/blog/planning-a-workshop)

### Goals

Next steps

### Instructions

After this workshop, **the facilitator drafts an initial concept note** and shares it with the client for feedback and approval.

Once the concept for the workshop is defined, the facilitator (and, if applicable, their team) moves to Part 2 - Drafting the agenda.

For more details on workshop planning, refer to SessionLab's [Step-by-step guide to planning a workshop.](http://www.sessionlab.com/blog/workshop-planning)

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# Part 2 - Drafting the agenda

A structured look at how to go from an initial concept to a detailed agenda for your future workshop.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | exercise |  | content |  | discussion/debriefing |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Time | Length |  | Title | Description | Additional Info | Goals | Materials |
| 09:00 | 0m |  | **Context** | This part of the template is dedicated to a meeting of the facilitation team: this might mean you and your co-facilitators or even you alone. |  | Collecting the information needed in order to draft an appropriate agenda for the future workshop |  |
| 09:00 | 5m |  | **Intention setting** | Start by clarifying your intention, your personal or team "why" for doing this workshop. | Ask yourself: what is my **intention** with running this workshop? What values do I want to bring to it? Take some notes. | Grounding and depth |  |
| 09:05 | 10m |  | **Reviewing materials** | Look back at the information you have collected. | **Review information** collected from email exchanges, interviews and the first "Sharing a vision" workshop. | Including existing boundaries and needs in the process of ideation. |  |
| 09:15 | 10m |  | **Brainstorming activities** | Make mindmaps or lists of methods, activities and ideas you have for the workshop. | There are many ways of **collecting ideas** for activities for your workshop. | Gathering as many ideas as possible for methods and activities to use. | * Sticky notes * Paper * Markers |
| 09:25 | 10m |  | **Prioritizing** | Start making some order and deciding what activities will be the core components of your workshop. | **Select a few activities or methods** that will be the core of your workshop. You might give priorities to:   * activities you are especially good at delivering; * methods your client has requested specifically; * something new for you, that you want to experiment with. | Choosing the most relevant activities for the workshop |  |
| 09:35 | 10m |  | **Creating a timeline** | Create a timeline with the skeleton agenda. Include the time the workshop will start and end, the main breaks (e.g. lunch) and populate it with your prioritized ideas. | Mark down the starting and end time and the main breaks (such as lunch) and arrange your ideas in **an order that creates a logical flow.** | Drafting a skeleton workshop agenda | * Whiteboard paper * Markers * SessionLab app |
| 09:45 | 5m |  | **Adding important bits** | Once you are happy with the main timeline, add all those important bits that make a session memorable: opening, closing, ice-breakers, energizers... | Add to your timeline important framing elements such as:   * **introduction**/opening; * **icebreakers** at the start; * **energizers** after breaks; * time for **debriefing** activities; * closing reflections and **feedback**; * **breaks**. | Creating an effective session |  |
| 09:50 | 5m |  | **Checking for coherence** | Look over your session, compare it with the desired outcomes you collected with the client and check that it is fit for purpose. | Be prepared to make some changes and variations. Refer back to your initial brainstorm to **check for alternative plans.** | Ensuring the design fits the requirements |  |
| 09:55 | 5m |  | **Getting your design ready for client** | Transfer your draft agenda to a format you can share with the client. | Write up your design in a sharable format. | Sharing your work with others | * Shared document, table, or SessionLab app |
| 10:00 | 0m |  | **What happens after - FOLLOW-UP** | After this workshop, the facilitator sends the draft agenda to the client and together they set a date for the "Refining the agenda" workshop to talk it through. | For more details on workshop planning, refer to SessionLab's [Step-by-step guide to planning a workshop.](http://www.sessionlab.com/blog/planning-a-workshop) | Next steps: sending a draft agenda to the client and meeting (in Part 3 - Refining the agenda) to discuss it. |  |
| *10:00* |  | |  |  |  |  |  |

Total length: 1h 00m

### Materials:

* Sticky notes in Brainstorming activities
* Paper in Brainstorming activities
* Markers x 2 in Brainstorming activities | Creating a timeline
* Whiteboard paper in Creating a timeline
* SessionLab app in Creating a timeline
* Shared document, table, or SessionLab app in Getting your design ready for client

# Part 2 - Drafting the agenda - block details

## Context

09:00 | 0m

This part of the template is dedicated to a meeting of the facilitation team: this might mean you and your co-facilitators or even you alone.

### Goals

Collecting the information needed in order to draft an appropriate agenda for the future workshop

### Instructions

Designing an agenda is quite **a personal process:** this is just an example that should include all the boxes you need to check, whether you do it in a meeting, alone, sitting on the floor surrounded by sticky notes, or in your head while taking a walk!

## Intention setting

09:00 | 5m

Start by clarifying your intention, your personal or team "why" for doing this workshop.

### Additional Information

Ask yourself: what is my **intention** with running this workshop? What values do I want to bring to it? Take some notes.

### Goals

Grounding and depth

### Instructions

Doodle or take notes on **questions of meaning and intention.** What values do you bring to the workshop? What leads you to want to support this group?

## Reviewing materials

09:05 | 10m

Look back at the information you have collected.

### Additional Information

**Review information** collected from email exchanges, interviews and the first "Sharing a vision" workshop.

### Goals

Including existing boundaries and needs in the process of ideation.

### Instructions

Look back at email exchanges, notes from interviews, the completed canvas from the "Sharing a vision" workshop, and so on. What are the **boundaries** of your design? What needs are you aiming to meet?

## Brainstorming activities

09:15 | 10m

Make mindmaps or lists of methods, activities and ideas you have for the workshop.

### Additional Information

There are many ways of **collecting ideas** for activities for your workshop.

### Materials

* Sticky notes
* Paper
* Markers

### Goals

Gathering as many ideas as possible for methods and activities to use.

### Instructions

There are many ways of **collecting ideas for activities** for your workshop.

## Prioritizing

09:25 | 10m

Start making some order and deciding what activities will be the core components of your workshop.

### Additional Information

**Select a few activities or methods** that will be the core of your workshop. You might give priorities to:

* activities you are especially good at delivering;
* methods your client has requested specifically;
* something new for you, that you want to experiment with.

### Goals

Choosing the most relevant activities for the workshop

### Instructions

Look over your notes so far and **select a few activities** or methods that will be the core of your workshop. You might prioritize:

* activities you are especially good at delivering;
* methods your client has requested specifically;
* something new for you, that you want to experiment with.

Don't throw out all those extra ideas just yet, they might come in handy in the next step!   
  
In a related discussion in [SessionLab's community,](https://community.sessionlab.com/join?invitation_token=7e1fdd4d19fc3262828965faf87da379e2f7b2fa-ce56dadb-b94d-40e4-8c5c-358252a4889b) our colleague Lani Beer included a relevant question to ask oneself and/or the client: *"* ***if we could only do one thing in the session,*** *what would be the most useful and engaging thing to do?"*

## Creating a timeline

09:35 | 10m

Create a timeline with the skeleton agenda. Include the time the workshop will start and end, the main breaks (e.g. lunch) and populate it with your prioritized ideas.

### Additional Information

Mark down the starting and end time and the main breaks (such as lunch) and arrange your ideas in **an order that creates a logical flow.**

### Materials

* Whiteboard paper
* Markers
* SessionLab app

### Goals

Drafting a skeleton workshop agenda

### Instructions

Move your ideas over to a **timeline**.

You might be using a specific methodology or theory as a scaffolding (e.g. [Kolb's learning cycle)](https://community.sessionlab.com/join?invitation_token=7e1fdd4d19fc3262828965faf87da379e2f7b2fa-ce56dadb-b94d-40e4-8c5c-358252a4889b). In any case, **try building a narrative around the order** you've chosen and see if it makes sense or if you need to make changes.

## Adding important bits

09:45 | 5m

Once you are happy with the main timeline, add all those important bits that make a session memorable: opening, closing, ice-breakers, energizers...

### Additional Information

Add to your timeline important framing elements such as:

* **introduction**/opening;
* **icebreakers** at the start;
* **energizers** after breaks;
* time for **debriefing** activities;
* closing reflections and **feedback**;
* **breaks**.

### Goals

Creating an effective session

### Instructions

Add all those **elements that make sessions memorable** and support participation and engagement throughout.

* An **introduction** and opening to thank organizers and frame the day (could be a presentation by the client, for example);
* **Icebreakers** and getting-to-know-each-other activities;
* **Energizers** after breaks or long sessions of content;
* Discussions for **debriefing** after exercises;
* Closing reflections and **feedback**:
* **Breaks**! I aim for a break after every 90 min of work, especially if online!

If at this point the timeline is too crowded, be prepared to sacrifice quantity for quality! Less is more!

## Checking for coherence

09:50 | 5m

Look over your session, compare it with the desired outcomes you collected with the client and check that it is fit for purpose.

### Additional Information

Be prepared to make some changes and variations. Refer back to your initial brainstorm to **check for alternative plans.**

### Goals

Ensuring the design fits the requirements

### Instructions

Look over your timeline once more and **check for coherence** with the desired outputs. Will it achieve the purpose it was designed for? Should you make some changes in view of this?

## Getting your design ready for client

09:55 | 5m

Transfer your draft agenda to a format you can share with the client.

### Additional Information

Write up your design in a sharable format.

### Materials

* Shared document, table, or SessionLab app

### Goals

Sharing your work with others

### Instructions

Materials you present to clients might include:

* letterhead with your (and the client's) **logo**;
* an **introduction** listing desired outcomes;
* a memo of the **date and location** of the workshop;
* **draft agenda** with main headings and a two-sentence explanation of each activity.

At this stage, I do not include a full script, nor a lot of details, as **the agenda is still open for feedback and changes** and I want this material to reflect that.

I also **underline any open questions or missing information** in bold font or make them otherwise very visible.

## What happens after - FOLLOW-UP

10:00 | 0m

After this workshop, the facilitator sends the draft agenda to the client and together they set a date for the "Refining the agenda" workshop to talk it through.

### Additional Information

For more details on workshop planning, refer to SessionLab's [Step-by-step guide to planning a workshop.](https://app.sessionlab.com/)

### Goals

Next steps: sending a draft agenda to the client and meeting (in Part 3 - Refining the agenda) to discuss it.

### Instructions

After this workshop, **the facilitator sends the draft agenda to the client** and together they set a date for the "Refining the agenda" workshop to talk it through.

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# Part 3 - Refining the agenda

In this one-hour meeting, client and facilitator (and their teams) meet to go through a proposed agenda, provide feedback and make any changes.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | energizer/icebreaker |  | content |  | discussion/debriefing |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Time | Length |  | Title | Description | Additional Info | Goals | Materials |
| 09:00 | 0m |  | **What happens before - CONTEXT** | This meeting is about sharing the fine points of your proposed agenda with your client and team, collecting feedback, and refining details. |  | Arriving at this workshop with a solid agenda, and having shared it with the client. |  |
| 09:00 | 5m |  | **Check-in** | Welcome everyone to the meeting and invite a round of sharing. It's invaluable to have a check-in, to **meet as human beings and build trust.** | **Invite a round of check-in** with a personal (but not *too* personal) question, such as favorite ice cream, favorite place to go on holiday, fun thing you did last week... | Connecting on a human level, building trust |  |
| 09:05 | 25m |  | **Going through agenda** | **Share the draft agenda** with everyone and go through it step-by-step. | Ideally, you will have sent out the draft agenda before the meeting. Nevertheless, it's worth sharing it again.   To avoid getting lost in the details, **start with the high-level "why"** and explain the **main sections of your design** before going into the timeline point-by-point. | Clarity and alignment, buy-in for the agenda | * Copies of the agenda (online, share the agenda from your screen) |
| 09:30 | 20m |  | **Collecting feedback** | Invite participants to comment on parts of the agenda they have doubts about and/or particularly approve of. | **Collect feedback on your design** in a quick, visual way by asking participants to add dots or sticky notes to different parts of the agenda. | Checking for consensus, refining the agenda | * Sticky notes * Sticky dots or different colors of markers * If online: a shared virtual whiteboard |
| 09:50 | 5m |  | **Meeting closing round (+ - !)** | Continuously improve your organization's meetings with this simple round of closing feedback: what did you enjoy most? What could have been better? Any other ideas for our meetings? | In effect, you are creating a temporary working team for the workshop so it's great to take the opportunity to **improve the way you work together.** | Shift the group's attention to observing the process; continous improvement of meetings | * A talking piece * Sticky notes (for large groups) or an online whiteboard (for large groups working remotely) |
| 09:55 | 5m |  | **Next steps/closing** | Thank everyone and remind them of the next steps. | Remind participants of how they can **contact you** and/or add comments they might think about later, and inform them of **next steps.** | Ending the meeting |  |
| 10:00 | 0m |  | **What happens after - FOLLOW-UP** | After this meeting, the facilitator will send out the final script/detailed agenda for the workshop. The next step is a final briefing shortly before the workshop date. | Once the agenda is finalized, share it with everyone and set a date for Part 4 - Briefing the team.   For more details on workshop planning, refer to SessionLab's [Step-by-step guide to planning a workshop.](http://www.sessionlab.com/blog/planning-a-workshop) | Next steps - setting a meeting before the workshop for a final check and briefing. |  |
| *10:00* |  | |  |  |  |  |  |

Total length: 1h 00m

### Materials:

* Copies of the agenda (online, share the agenda from your screen) in Going through agenda
* Sticky notes  in Collecting feedback
* Sticky dots or different colors of markers  in Collecting feedback
* If online: a shared virtual whiteboard in Collecting feedback
* A talking piece in Meeting closing round (+ - !)
* Sticky notes (for large groups) or an online whiteboard (for large groups working remotely) in Meeting closing round (+ - !)

# Part 3 - Refining the agenda - block details

## What happens before - CONTEXT

09:00 | 0m

This meeting is about sharing the fine points of your proposed agenda with your client and team, collecting feedback, and refining details.

### Goals

Arriving at this workshop with a solid agenda, and having shared it with the client.

### Instructions

This 1-hour workshop is about sharing your draft agenda with the client and stakeholders, and getting their feedback and comments.  
  
Insofar as possible, send all participants the agenda with some advance so they can start to familiarize themselves with it before meeting.

## Check-in

09:00 | 5m

Welcome everyone to the meeting and invite a round of sharing. It's invaluable to have a check-in, to **meet as human beings and build trust.**

### Additional Information

**Invite a round of check-in** with a personal (but not *too* personal) question, such as favorite ice cream, favorite place to go on holiday, fun thing you did last week...

### Goals

Connecting on a human level, building trust

### Instructions

Explain that you will invite a round of sharing to kick-start the meeting, offer a question and answer yourself first (also in order to model answering briefly and to the point!).  
  
**Invite a round of check-in** with a personal (but not *too* personal) question, such as favorite ice cream, favorite place to go on holiday, fun thing you did last week...

## Going through agenda

09:05 | 25m

**Share the draft agenda** with everyone and go through it step-by-step.

### Additional Information

Ideally, you will have sent out the draft agenda before the meeting. Nevertheless, it's worth sharing it again.   
  
To avoid getting lost in the details, **start with the high-level "why"** and explain the **main sections of your design** before going into the timeline point-by-point.

### Materials

* Copies of the agenda (online, share the agenda from your screen)

### Goals

Clarity and alignment, buy-in for the agenda

### Instructions

Ideally, you will have sent out the draft agenda before the meeting. Nevertheless, it's worth sharing it again.   
  
To avoid getting lost in the details, **start with the high-level "why"** and explain the **main sections of your design** before going into the timeline point-by-point.

## Collecting feedback

09:30 | 20m

Invite participants to comment on parts of the agenda they have doubts about and/or particularly approve of.

### Additional Information

**Collect feedback on your design** in a quick, visual way by asking participants to add dots or sticky notes to different parts of the agenda.

### Materials

* Sticky notes
* Sticky dots or different colors of markers
* If online: a shared virtual whiteboard

### Goals

Checking for consensus, refining the agenda

### Instructions

**If the group is small (up to 5/6 people),** ask participants to:

* add a blue dot to **parts of the agenda they particularly like**;
* add a red dot to **parts they have doubts about.**

Then, open the floor for comments and questions: there are plenty of red dots around this point, would someone be willing to tell us a bit more about why? What could we change here?   
  
**If the group is larger than 5/6 people,** instead of using dots hand out different colors of sticky notes and ask attendees to **add a comment.** Collect the notes and make your own revisions and changes later.

**Facilitator's notes**  
  
If you can reach an agreement during the workshop on changes to make, that's great, but it's also perfectly fine to thank participants for their input and **make changes in your own time** after the meeting is over.

## Meeting closing round (+ - !)

09:50 | 5m

Continuously improve your organization's meetings with this simple round of closing feedback: what did you enjoy most? What could have been better? Any other ideas for our meetings?

### Additional Information

In effect, you are creating a temporary working team for the workshop so it's great to take the opportunity to **improve the way you work together.**

### Materials

* A talking piece
* Sticky notes (for large groups) or an online whiteboard (for large groups working remotely)

### Goals

Shift the group's attention to observing the process; continous improvement of meetings

### Instructions

At the end of each meeting, ask for **feedback on the meeting *process*** (not on the content!) in three categories:

**(+) what went well** / did you most appreciate?

**(-) what could have gone differently** / should we change?

**(!) any other ideas** about improving our meetings?

Incorporate this feedback in your next meeting in order to design structures and processes that are tailored on this specific group and work for it!

**If the group is small enough, do this in rounds. If there is not enough time for rounds, collect sticky notes on a board** with the three categories written up.

**Facilitator's notes**

This basic tool invites everyone to **look at what just happened from the point of view of process** (*how* we work together rather than *what* we are working on)**.** It can be extremely helpful in getting team members on board in co-designing collaborative meetings!

Sometimes people are shy about talking about what does not work and answer something vague like "nothing, it was great!". **Sometimes it's worth gently asking twice** and reassuring participants that you are asking in order to support everyone's learning.

**The third point (!) is a space for extra ideas that do not immediately fit the mold** of "best" and "to be improved". Sometimes there is nothing to say here, but sometimes there is a gold nugget.

If you are not having another meeting with this particular group of people, this is still a good structure for you to get feedback you can apply to future events.

**Remote and hybrid meetings**

This structure works just as well for remote and hybrid meetings. If a round is not possible, **online you can ask for reflections in the chat box, in a shared minutes document, or on a virtual whiteboard.**

**(1) do a round** (here are tips on how);

**(2) have everyone work from personal devices** on shared documents or a poll or

**(3) collect insights on virtual and in-person whiteboards** and then share the key points out loud in plenary.

In all cases, **learning what worked and didn't work for the different cohorts can certainly raise participants' awareness** of how to make the space more inclusive for all!

## Next steps/closing

09:55 | 5m

Thank everyone and remind them of the next steps.

### Additional Information

Remind participants of how they can **contact you** and/or add comments they might think about later, and inform them of **next steps.**

### Goals

Ending the meeting

### Instructions

Thanks everyone for their input.   
  
You might want to give participants ways to add more feedback and thoughts after the meeting, e.g. by **allowing for comments on the agenda, or via email.**

* the facilitator will share the final agenda/script;
* there will be a briefing shortly before the workshop.

## What happens after - FOLLOW-UP

10:00 | 0m

After this meeting, the facilitator will send out the final script/detailed agenda for the workshop. The next step is a final briefing shortly before the workshop date.

### Additional Information

Once the agenda is finalized, share it with everyone and set a date for Part 4 - Briefing the team.   
  
For more details on workshop planning, refer to SessionLab's [Step-by-step guide to planning a workshop.](http://www.sessionlab.com/blog/planning-a-workshop)

### Goals

Next steps - setting a meeting before the workshop for a final check and briefing.

### Instructions

After this meeting, the facilitator will send out the final script/detailed agenda for the workshop. **The next step is a final briefing** shortly before the workshop date.

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# Part 4 - Briefing the team

A briefing session for everyone involved in a future workshop to be aligned and clear about the agenda, roles and responsibilities.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | energizer/icebreaker |  | content |  | discussion/debriefing |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Time | Length |  | Title | Description | Additional Info | Goals | Materials |
| 09:00 | 0m |  | **What happens before - CONTEXT** | This meeting is about getting all the backstage work for the workshop well organized. It will ideally be attended by your client, facilitation team, and by any speakers involved in the event (content providers, keynote speakers, etc.) |  | Arriving at this meeting with a confirmed agenda. |  |
| 09:00 | 5m |  | **Check-in** | Welcome everyone to the meeting and invite a round of sharing. It's invaluable to have a check-in round to meet as human beings and build trust. | Start the meeting in a similar way to Part 3 - Refining the agenda: **shared rituals** help build a sense of alignment in the team! | Connect on a human level, build trust, establish a shared ritual for the team |  |
| 09:05 | 20m |  | **Going through agenda** | Share the workshop agenda | The facilitator shares the agenda, explaining that the main purpose of the day is to check that everyone is comfortable and aware of what to expect.   Remind everyone of the high-level purpose, intention, and desired outcomes. Rather than go through all the details, **focus on where team members and/or speakers will be contributing** and check for any questions. | Alignment and clarity | * Copies of the agenda (online, share the agenda from your screen) |
| 09:25 | 15m |  | **Confirming roles & responsibilities** | Check for alignment on action points | Check that everyone knows when they will be leading or contributing and **what is expected from them.** | Alignment, effective team work | * Copies of the agenda (if online: share the agenda from your screen) |
| 09:40 | 10m |  | **Q&A** | Make space for questions and last-minute requests. | Open the floor for any **questions and/or requests.** | Clarity |  |
| 09:50 | 5m |  | **Intentions for the workshop** | Raise the energy by sharing once more everyone's high hopes and intentions for a successful event! | Bring the meeting to a close with a **round of intentions.** Ask something along the lines of "What are your highest hopes for this workshop?" | Raising motivation |  |
| 09:55 | 5m |  | **Meeting closing round (+ - !)** | Continuously improve your organization's meetings with this simple round of closing feedback: what did you enjoy most? What could have been better? Any other ideas on our meetings? | End this meeting in the same way as the previous one to support the consolidation of a team spirit. Ask for feedback as part of **learning how to work better together.** | Shift the group's attention to observing the process; continous improvement of meetings | * A talking piece * Sticky notes (for large groups) or an online whiteboard (for large groups working remotely) |
| 10:00 | 0m |  | **What happens after - FOLLOW-UP** | The workshop! | It's time to get the actual workshop done!  After the workshop, leave some time for data collection and reporting and set a date for the last client/facilitator meeting: Part 5 - Collecting learnings.   For more details on workshop planning, you can read SessionLab's [Step-by-step guide to planning a workshop.](http://www.sessionlab.com/blog/planning-a-workshop) | Next steps - holding the workshop! |  |
| *10:00* |  | |  |  |  |  |  |

Total length: 1h 00m

### Materials:

* Copies of the agenda (online, share the agenda from your screen) in Going through agenda
* Copies of the agenda (if online: share the agenda from your screen) in Confirming roles & responsibilities
* A talking piece in Meeting closing round (+ - !)
* Sticky notes (for large groups) or an online whiteboard (for large groups working remotely) in Meeting closing round (+ - !)

# Part 4 - Briefing the team - block details

## What happens before - CONTEXT

09:00 | 0m

This meeting is about getting all the backstage work for the workshop well organized. It will ideally be attended by your client, facilitation team, and by any speakers involved in the event (content providers, keynote speakers, etc.)

### Additional Information

### Goals

Arriving at this meeting with a confirmed agenda.

### Instructions

This briefing is the last meeting before the workshop and should be dedicated mainly to briefing speakers and team members, **making sure everyone knows what is expected from them**, and checking any last-minute technical details.

At this point, the assumption is that the final agenda has been agreed upon either at the Part 3 - Refining the agenda meeting or in following client/facilitator communications.

## Check-in

09:00 | 5m

Welcome everyone to the meeting and invite a round of sharing. It's invaluable to have a check-in round to meet as human beings and build trust.

### Additional Information

Start the meeting in a similar way to Part 3 - Refining the agenda: **shared rituals** help build a sense of alignment in the team!

### Goals

Connect on a human level, build trust, establish a shared ritual for the team

### Instructions

**Invite a round of check-in** with a personal (but not *too* personal) question, such as favorite ice cream, favorite place to go on holiday, fun thing you did last week...

## Going through agenda

09:05 | 20m

Share the workshop agenda

### Additional Information

The facilitator shares the agenda, explaining that the main purpose of the day is to check that everyone is comfortable and aware of what to expect.   
  
Remind everyone of the high-level purpose, intention, and desired outcomes. Rather than go through all the details, **focus on where team members and/or speakers will be contributing** and check for any questions.

### Materials

* Copies of the agenda (online, share the agenda from your screen)

### Goals

Alignment and clarity

### Instructions

**The facilitator shares the agenda,** explaining that the main purpose of the day is to check that everyone is comfortable and aware of what to expect.

## Confirming roles & responsibilities

09:25 | 15m

Check for alignment on action points

### Additional Information

Check that everyone knows when they will be leading or contributing and **what is expected from them.**

### Materials

* Copies of the agenda (if online: share the agenda from your screen)

### Goals

Alignment, effective team work

### Instructions

This step can include, for example:

* **checking that speakers can share screen** and that their presentations work;
* verifying that any **materials needed** are on your list;
* making sure someone is assigned to take care of **special needs** e.g. if you have participants with mobility impairments;
* confirming what channels you will be using **to communicate within the organizing team.**

## Q&A

09:40 | 10m

Make space for questions and last-minute requests.

### Additional Information

Open the floor for any **questions and/or requests.**

### Goals

Clarity

### Instructions

Open the floor for any questions and/or requests. **Does anyone need some resources or support they do not have yet?**

## Intentions for the workshop

09:50 | 5m

Raise the energy by sharing once more everyone's high hopes and intentions for a successful event!

### Additional Information

Bring the meeting to a close with a **round of intentions.** Ask something along the lines of "What are your highest hopes for this workshop?"

### Goals

Raising motivation

### Instructions

Hearing one another's high hopes and intentions raises the team's energy and motivation. This is often an uplifting moment when after solving all the small technical details **we reconnect to purpose.**

## Meeting closing round (+ - !)

09:55 | 5m

Continuously improve your organization's meetings with this simple round of closing feedback: what did you enjoy most? What could have been better? Any other ideas on our meetings?

### Additional Information

End this meeting in the same way as the previous one to support the consolidation of a team spirit. Ask for feedback as part of **learning how to work better together.**

### Materials

* A talking piece
* Sticky notes (for large groups) or an online whiteboard (for large groups working remotely)

### Goals

Shift the group's attention to observing the process; continous improvement of meetings

### Instructions

At the end of each meeting, ask for **feedback on the meeting *process*** (not on the content!) in three categories:

**(+) what went well** / did you most appreciate?

**(-) what could have gone differently** / should we change?

**(!) any other ideas** about improving our meetings?

Incorporate this feedback in your next meeting in order to design structures and processes that are tailored on this specific group and work for it!

**If the group is small enough, do this in rounds. If there is not enough time for rounds, collect sticky notes on a board** with the three categories written up.

**Facilitator's notes**

This basic tool invites everyone to **look at what just happened from the point of view of process** (*how* we work together rather than *what* we are working on)**.** It can be extremely helpful in getting team members on board in co-designing collaborative meetings!

Sometimes people are shy about talking about what does not work and answer something vague like "nothing, it was great!". **Sometimes it's worth gently asking twice** and reassuring participants that you are asking in order to support everyone's learning.

**The third point (!) is a space for extra ideas that do not immediately fit the mold** of "best" and "to be improved". Sometimes there is nothing to say here, but sometimes there is a gold nugget.

If you are not having another meeting with this particular group of people, this is still a good structure for you to get feedback you can apply to future events.

**Remote and hybrid meetings**

This structure works just as well for remote and hybrid meetings. If a round is not possible, **online you can ask for reflections in the chat box, in a shared minutes document, or on a virtual whiteboard.**

**(1) do a round** (here are [tips](http://www.sessionlab.com/blog/workshop-planning) on how);

**(2) have everyone work from personal devices** on shared documents or a poll or

**(3) collect insights on virtual and in-person whiteboards** and then share the key points out loud in plenary.

In all cases, **learning what worked and didn't work for the different cohorts can certainly raise participants' awareness** of how to make the space more inclusive for all!

## What happens after - FOLLOW-UP

10:00 | 0m

The workshop!

### Additional Information

It's time to get the actual workshop done!   
After the workshop, leave some time for data collection and reporting and set a date for the last client/facilitator meeting: Part 5 - Collecting learnings.   
  
For more details on workshop planning, you can read SessionLab's Step-by-step guide to planning a workshop.

### Goals

Next steps - holding the workshop!

### Instructions

The actual workshop is the next step after this briefing.   
  
After the workshop, leave some time for data collection and reporting, then set a date for the last client/facilitator meeting: Part 5 - Collecting learnings.  
  
For more details on workshop planning, you can read SessionLab's [Step-by-step guide to planning a workshop.](http://www.sessionlab.com/blog/planning-a-workshop)

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# Part 5 - Collecting learnings

This 1-hour facilitator/client meeting is dedicated to collecting and sharing reflections and feedback after a workshop. It includes some time for appreciation, an after-action review, and any possible next steps.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | energizer/icebreaker |  | exercise |  | discussion/debriefing |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Time | Length |  | Title | Description | Additional Info | Goals | Materials |
| 09:00 | 0m |  | **What happens before - CONTEXT** | This is the last meeting of the series. It is a space for reflection, learning and consolidating a professional relationship. |  | Arriving ready for this reflection workshop |  |
| 09:00 | 5m |  | **Check-in** | Welcome everyone to the meeting and invite a round of sharing. It's invaluable to have a check-in round to meet as human beings and build trust. | By now you will have established an opening ritual for this group of excellent workshop organizers.  Start with **a round of personal sharing,** which can also be themed around the workshop (but keep it light and playful, there will be time for the retrospective later!).  After an international event, for example, you might ask "having met participants from all around the world, which country would you now like to visit and why?" | Alignment and trust | * Talking piece |
| 09:05 | 5m |  | **Introduction** | Open the meeting by clarifying its purpose. | **Share your intention** to create a space for learning, from success as well as from things that could be improved. | Opening |  |
| 09:10 | 10m |  | **Appreciation relay** | Everyone in the team gives and receives appreciation from another person, passing the "appreciation" baton relay-race style! | Raise the energy and team cohesion by starting with gratitude and appreciation.    **Explain that each person will be giving appreciation to one other team member.** Invite concrete and direct comments such as expressing thanks for something specific the other person did for or during the workshop. | More cohesion and raising energy and all-around good feelings in the team, in a quick way. | * A talking piece * Random name picker |
| 09:20 | 30m |  | **After Action Review** | After Action Reviews are typically done during and after a project's lifetime to generate learning for the future | Run a quick version of an After Action Review by asking participants to add sticky notes to posters with the questions:      1. What was intended? 2. What actually happened? **3. What did we learn?** 4. Who are we going to tell?  **Review and discuss collected notes together.**    You can also pick other ideas for retrospectives here: [https://www.teamretro.com/retrospectives/](http://www.sessionlab.com/blog/planning-a-workshop) | To evaluate any project or event and communicate the learning from the evaluation to the appropriate stake holders. | * flipcharts * sticky notes * markers |
| 09:50 | 10m |  | **Checkout** | A final round of sharing and thanks. | Complete the cycle by asking everyone to share **one learning they are taking home** from this experience. | Closing | * Talking piece |
| *10:00* |  | |  |  |  |  |  |

Total length: 1h 00m

### Materials:

* Talking piece x 2 in Check-in | Checkout
* A talking piece in Appreciation relay
* Random name picker  in Appreciation relay
* flipcharts in After Action Review
* sticky notes in After Action Review
* markers in After Action Review

# Part 5 - Collecting learnings - block details

## What happens before - CONTEXT

09:00 | 0m

This is the last meeting of the series. It is a space for reflection, learning and consolidating a professional relationship.

### Goals

Arriving ready for this reflection workshop

### Instructions

Before this step, you will have already:

* run the workshop!
* collected information and data in a report;
* had some time for your own personal reflection.

Join the meeting with a curious, open mind... but also, prepare by noting down **a few key points from your personal reflections** that you want to make sure are heard!

## Check-in

09:00 | 5m

Welcome everyone to the meeting and invite a round of sharing. It's invaluable to have a check-in round to meet as human beings and build trust.

### Additional Information

By now you will have established an opening ritual for this group of excellent workshop organizers.   
Start with **a round of personal sharing,** which can also be themed around the workshop (but keep it light and playful, there will be time for the retrospective later!).

After an international event, for example, you might ask "having met participants from all around the world, which country would you now like to visit and why?"

### Materials

* Talking piece

### Goals

Alignment and trust

### Instructions

By now you have established a functional ritual for this group of excellent workshop organizers. Start with a round of personal sharing, which can also be themed around the workshop (but keep it light and playful, there will be time for the retrospective later!).

After an international event, for example, you might ask "having met participants from all around the world, which country would you now like to visit and why?"

## Introduction

09:05 | 5m

Open the meeting by clarifying its purpose.

### Additional Information

**Share your intention** to create a space for learning, from success as well as from things that could be improved.

### Goals

Opening

### Instructions

**Share your intention** to create a space for learning, from success as well as from things that could be improved.

## Appreciation relay

09:10 | 10m

Everyone in the team gives and receives appreciation from another person, passing the "appreciation" baton relay-race style!

### Additional Information

Raise the energy and team cohesion by starting with gratitude and appreciation.

**Explain that each person will be giving appreciation to one other team member.** Invite concrete and direct comments such as expressing thanks for something specific the other person did for or during the workshop.

### Materials

* A talking piece
* Random name picker

### Goals

More cohesion and raising energy and all-around good feelings in the team, in a quick way.

### Instructions

**Explain that each person will be giving appreciation to one other team member.** Invite concrete and direct comments such as expressing thanks for something specific the other person did for or during the workshop.

To pick names at random, you can use an online random name picker such as [Wheel of Names](http://www.sessionlab.com/blog/planning-a-workshop), especially **if you are online**, or put everyone's name in a hat.

Pick a random person to begin or start yourself. Pick a second name at random: this is the person who will receive appreciation first.

The person who has received appreciation is the next one to go: pick a random name for them, and so on, until the last person is left. The last person will give appreciation to the one who started first, thereby closing the circle.

**Facilitator's notes**

This is a variation of many possible gratitude/appreciation rounds: because in this case everyone gives/receives appreciation to/from only one person, it is faster to run. 

## After Action Review

09:20 | 30m

After Action Reviews are typically done during and after a project's lifetime to generate learning for the future

### Additional Information

Run a quick version of an After Action Review by asking participants to add sticky notes to posters with the questions:

1. What was intended?  
2. What actually happened?  
**3. What did we learn?**  
4. Who are we going to tell?  
  
**Review and discuss collected notes together.**

You can also pick other ideas for retrospectives here: [https://www.teamretro.com/retrospectives/](https://www.teamretro.com/retrospectives/flap-retrospective-activity)

### Materials

* flipcharts
* sticky notes
* markers

### Goals

To evaluate any project or event and communicate the learning from the evaluation to the appropriate stake holders.

### Background

1. Opening  
2. What was intended?  
3. What actually happened?  
4. What did we learn?  
5. Who are we going to tell?

***Alternative names:*** AAR

## Checkout

09:50 | 10m

A final round of sharing and thanks.

### Additional Information

Complete the cycle by asking everyone to share **one learning they are taking home** from this experience.

### Materials

* Talking piece

### Goals

Closing

### Instructions

Ask participants to briefly share **one key learning they are taking home.**