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

Workshop Planning Template - 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

09:00		Introduction
09:05		Check-in
09:10		Context and non-negotiables
09:15		Ladder of engagement
09:25		Defining tangible outputs
09:35		Brainstorming intangible outputs
09:50		Intentions for the workshop
09:55		Next steps & closing
10:00		What happens after - FOLLOW-UP
10:00		*End*

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

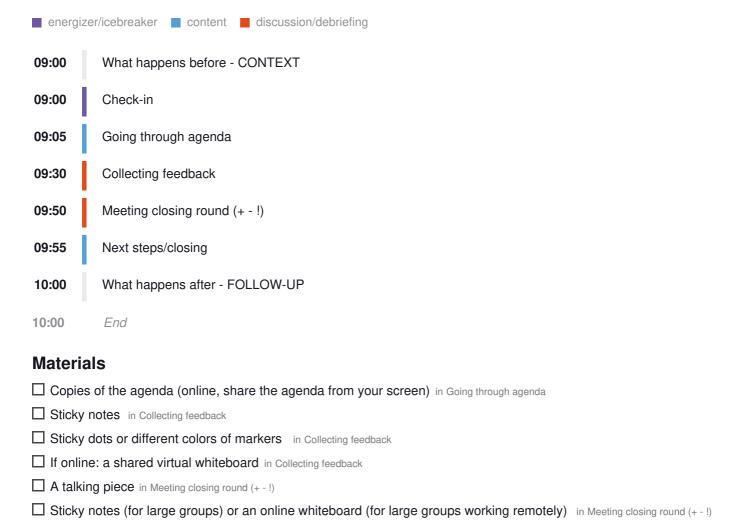# Workshop Planning Template - Part 2 - Drafting the agenda

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

🟩 exercise 🟦 content 🟥 discussion/debriefing

09:00		What happens before - CONTEXT
09:00	🟩	Intention setting
09:05	🟦	Reviewing materials
09:15	🟩	Brainstorming activities
09:25	🟩	Prioritizing
09:35	🟩	Creating a timeline
09:45	🟩	Adding important bits
09:50	🟥	Checking for coherence
09:55	🟩	Getting your design ready for client
10:00		What happens after - FOLLOW-UP
10:00		*End*

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

Workshop Planning Template - 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

09:00		What happens before - CONTEXT
09:00		Check-in
09:05		Going through agenda
09:30		Collecting feedback
09:50		Meeting closing round (+ - !)
09:55		Next steps/closing
10:00		What happens after - FOLLOW-UP
10:00		*End*

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 (+ - !)

Workshop Planning Template - 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

09:00		What happens before - CONTEXT
09:00		Check-in
09:05		Going through agenda
09:25		Confirming roles & responsibilities
09:40		Q&A
09:50		Intentions for the workshop
09:55		Meeting closing round (+ - !)
10:00		What happens after - FOLLOW-UP
10:00		*End*

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 (+ - !)

Workshop Planning Template - 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.

For more details on workshop planning, you can read SessionLab's Step-by-step guide to planning a workshop.

■ energizer/icebreaker ■ exercise ■ discussion/debriefing

09:00		What happens before - CONTEXT
09:00		Check-in
09:05		Introduction
09:10		Appreciation relay
09:20		After Action Review
09:50		Checkout
10:00		*End*

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