

SessionLab's Complete Guide to Workshop Planning



SessionLab

Welcome

A well-designed workshop is a proven method for achieving incredible results with a group. But how do you even get started?

What best practices do expert facilitators use to guide their teams toward meaningful outcomes? How can you design an agenda that creates a truly engaging, collaborative environment?

Whether you're a facilitator by trade or new to the practice, working freelance or in-house, this guide will help you plan a successful workshop from start to finish. You'll find a step-by-step process filled with practical tips and insights.

At SessionLab, we build the platform for designing and managing facilitation at any scale. From crafting excellent session agendas to collecting participant feedback, distributing facilitator guides, and tracking delivery across your team, we're your partner throughout the entire facilitation process.

We believe that facilitation can help teams of any size create meaningful change and achieve their collective goals. And we hope that this guide will help you and your team do just that. You will find all the information you need to define your session's objectives, craft your program, organize logistics, and run an impactful workshop!



This guide was put together with ♥ by James Smart, Deborah Rim Moiso and Laura Vidal from SessionLab.



James Smart
Head of Content



Deborah Rim Moiso
Content writer & IAF Endorsed Facilitator



Laura Vidal
Designer



Contents

Welcome	2
What is a workshop?	4
When to run a workshop	5
Who can run a workshop?	6
How to plan a workshop	6
Designing and running a workshop in four phases.	8
Phase 1 – Vision	10
Phase 2 – Design	16
Why is agenda design important?	20
Phase 3 – Act	24
Phase 4 – Learn	30
10 tips for effective agenda design	36
Conclusion	48

What is a workshop?

A workshop is a structured, interactive session designed to guide a group through a process and achieve a productive outcome.

Workshops are designed to engage participants and encourage their active involvement in the process. But facilitation doesn't stop at workshops. The same principles that make a workshop effective — structured participation, clear outcomes, and space for everyone to contribute — can transform a training session from a one-way lecture into genuine collaborative learning. They can turn a status update meeting into a session where real decisions get made.

Workshops typically involve using hands-on activities, group discussions, collaborative exercises and other techniques which allow participants to explore, ideate, and participate in achieving a desired outcome. Facilitators and workshop leaders design a structured workshop agenda to help guide this process.

In practice, this means having an agenda with a clear beginning, middle and end. Workshops often start by defining a problem space, highlighting desired outcomes and getting participants in the right headspace to contribute. They then create space for participants to explore that space with collaborative activities and discussions. Finally, workshops always have a clear end, where outcomes are reached, next steps are defined and participants are invited to reflect.

Workshops can cover almost any topic you can think of: innovation and idea generation, problem solving and decision making, or defining company culture and shared values.

Whether you're running a problem-solving workshop, an instructor-led training program, or a team meeting that needs to actually go somewhere, the facilitator's job is the same: design a process that helps the group do their best work together.



When to run a workshop

Running a workshop can be one of the most effective ways to bring a group together to innovate, solve tricky problems and deeply connect.

But this isn't to say every session you do should be a workshop. There are times when a meeting, such as a daily standup or a company all-hands, is the right way to come together.

Workshops are especially effective when you need to solve a tricky problem without a clear solution. The collaborative environment of a workshop is great for awakening the collective intelligence of a group and finding new ideas and perspectives. Workshops are also wonderful for learning experientially and holding structured group discussions that create space for everyone to contribute.

Some of the common triggers for running a workshop include:

- >> having a complex problem without a clear solution
- >> a need for genuine innovation and new ideas
- >> team building or team development
- >> learning new skills experientially
- >> community building
- >> developing a strategy or making big decisions
- >> opening or closing a project

In short, any time you want to **bring a group together** to solve tough problems, make progress or achieve an important outcome quickly, that's a good trigger for running a workshop.

Who can run a workshop?

The foundation for a successful workshop is a combination of great planning and effective facilitation.

Often, the person running a session is a team leader, L&D professional, or trained facilitator: someone whose job it is to design effective processes and engage participants in pursuit of a shared goal. But facilitation skills are increasingly valued across roles. Managers who can facilitate well run better team meetings. Trainers who apply facilitation principles create more engaging learning experiences.

For organizations, ensuring every session meets a consistent standard requires shared processes, reusable templates, and clear guidelines that any facilitator on your team can follow.

At SessionLab, we believe that with practice, the right tools, and a facilitation mindset, anyone can run a great session. This step-by-step guide is a great way to start, and a foundation you can build on as your practice grows.

How to plan a workshop

A workshop is a process of change. A successful workshop will be one in which everyone in the group will have learned something, or be on the way to creating transformation in their organization, team or project.

There is much more to running a successful workshop than the delivery phase, when you actually stand in front of the group and lead activities. So much happens before, after and behind the scenes in order to make the session a success.

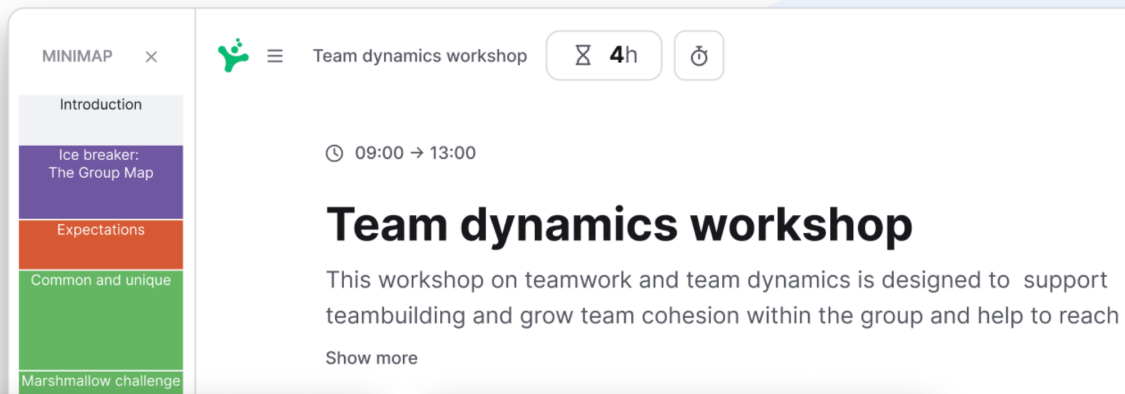
But what's the best way to get started?
What steps should you follow to take an idea or brief and turn it into a completed workshop?

Read on to learn a **step-by-step approach** to planning a workshop that will help you run more effective, engaging sessions.



Your complete facilitation workflow in one place

www.sessionlab.com



MINIMAP x

- Introduction
- Ice breaker: The Group Map
- Expectations
- Common and unique
- Marshmallow challenge

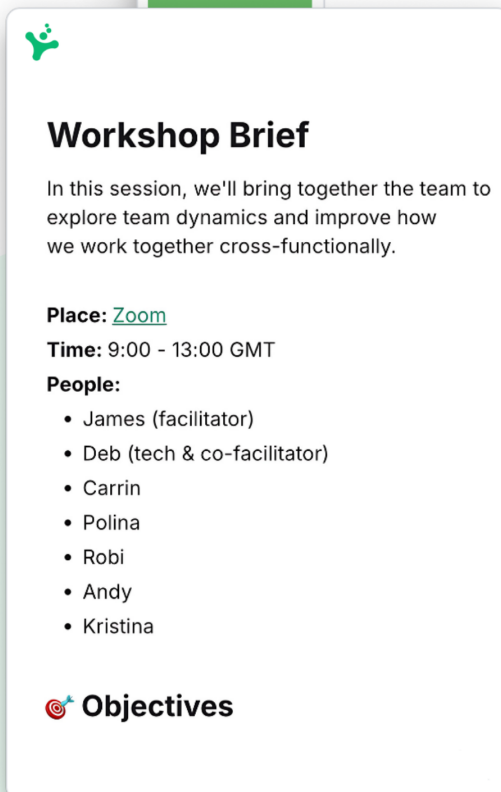
Team dynamics workshop ⌵ 4h ⌵

🕒 09:00 → 13:00

Team dynamics workshop

This workshop on teamwork and team dynamics is designed to support teambuilding and grow team cohesion within the group and help to reach

Show more



Workshop Brief

In this session, we'll bring together the team to explore team dynamics and improve how we work together cross-functionally.

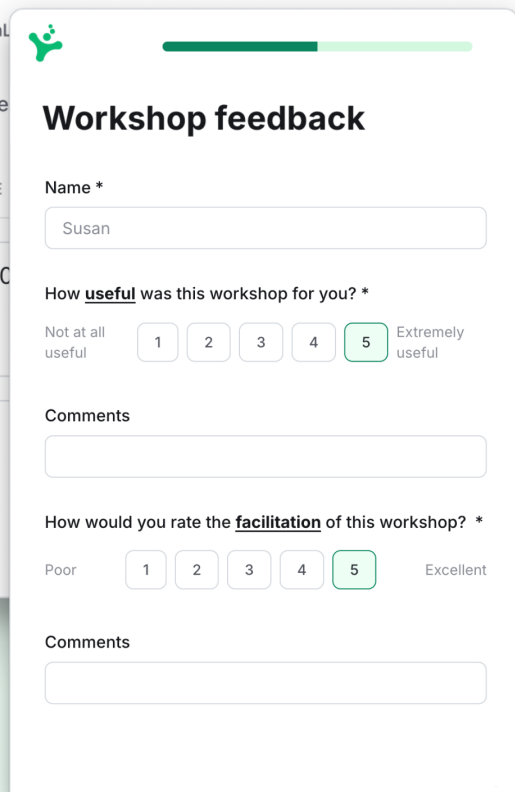
Place: [Zoom](#)

Time: 9:00 - 13:00 GMT

People:

- James (facilitator)
- Deb (tech & co-facilitator)
- Carrin
- Polina
- Robi
- Andy
- Kristina

 **Objectives**



Workshop feedback

Name *

How **useful** was this workshop for you? *

Not at all useful 1 2 3 4 5 Extremely useful

Comments

How would you rate the **facilitation** of this workshop? *

Poor 1 2 3 4 5 Excellent

Comments

Designing and running a workshop in four phases

We have divided the process of designing a workshop into four sections. This framework is an invitation to move in a structured way from dreaming to designing, from designing to doing, and from doing to celebrating and learning.

Each phase (vision, design, action and learning) is divided into subsections defining specific actions you need to take when planning your workshop.

A workshop is not designed in isolation. It can be the work of two people (the workshop facilitator and a client) or an entire team, including communication specialists, speakers, co-facilitators, tech experts and more.

To support the collaborative process, we've included a set of meeting agendas you can use when getting together with clients and teammates during the design process. Find them at the end of each section.



The four step workshop planning process, inspired by the Dragon Dreaming design methodology, as codified by John Croft.





SESSIONLAB TIP

Each meeting agenda contains a step-by-step guide to running the session with instructions, timings and facilitation tips.

See the complete template and adjust it to your needs at www.sessionlab.com/templates/workshop-planning-template.

Workshop planning template - Part 5 - Collecting learnings



This 1-hour facilitation template is designed to help you collect and share reflections and feedback after a workshop. It includes some tips and a checklist for the facilitator.

For more details

Workshop planning template - Part 4 - Briefing the team

A briefing session for everyone involved in a future workshop to be aligned and clear on the goals and objectives.

Workshop planning template - Part 3 - Refining the agenda



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

energizer/icebreaker

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.



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

TIME	NAME	DESCRIPTION	ADDITIONAL INFO
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 .
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.
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. If at this point elements emerge that are not data and facts, just park them in the appropriate section of the board.
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 .
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.
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.
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.
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).
10:00 0	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.

10:00

TOTAL LENGTH: 1h 00m

ADDITIONAL INFO

You will have already:

- vision for the workshop with your previous point;
- (email) a concept note for the

read for that concept and/or back.

my **intention** with running this. What do I want to bring to it?

collected from email and the first "Sharing a

s of **collecting ideas** for kshop.

ake lists of possibilities, or put sticky note, or make mind maps.

is or **methods** that will be the. You might give priorities to:

specially good at delivering; it has requested specifically; you, that you want to

and end time and the main and arrange your ideas in an **logical flow**.

portant framing elements

g;

start;

aks;

activities;

nd **feedback**;

me changes and variations. brainstorm to **check for**

a sharable format.



Phase 1 – Vision

Every project begins as an idea in somebody's mind, but it really starts to take shape once it's shared with someone else.

In the first part of the process, we cover how to lead conversations that will move an idea or vision from the abstract to a more concrete realm.

The workshop design process **starts with a kick-off meeting**, where you and the person commissioning the workshop will explore the vision and important aspects of the future session.

What are the desired outcomes? Who will be attending? Are there non-negotiable elements (e.g. has the date been set already)? The answers to these questions will help you draft an initial concept for the session.

Use the Workshop Vision Blueprint to capture essential information at this stage of the design work.

Workshop Vision Blueprint

Intention

To align around needs and objectives for the workshop

Agenda for this meeting

- Opening check-in: who's in the room?
- Populating the blueprint with sticky notes
- Clarifications and discussion points
- Closing: feedback on the meeting and next steps

What happens next

The facilitator prepares an outline of the workshop

Check in

Context — Information that is clear and non negotiable

👤 People

📍 Place

🕒 Timing

What is the purpose of the workshop?

Key questions to be explored

Engagement level

Remember to consider your own engagement level as well as the engagement level of the participants. This is a key factor in determining the success of the workshop.

Design ideas

Results — Desired outcomes — Key deliverables — Output

Tangible

Intangible

Next steps

Check out

What went well in the meeting?

What can we improve?

To be refined into a draft proposal by the facilitators by [date]

SHARING INTENTIONS

The first step of any workshop planning process is to understand the desired outcomes and goals of the session.

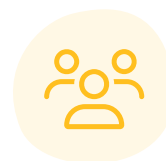
Begin by running a mini-workshop with your client to help clarify intentions and align on the key elements of the session. Time spent on this now will save time and resources by minimizing the risk of misunderstandings and re-writes later!

There are **four key elements** to check for when looking for desired outcomes at this very early stage:

Non-negotiables	These are the boundaries for your design, the things that are set and cannot be changed. Non-negotiables might include the date and time, location, workshop duration or the list of participants.
Tangible outcomes (deliverables)	What outcomes needs to be produced by the end of the workshop? Is it an action plan? A set of decisions? A report? Try to get as many details as possible on this requirement. If this point is not initially clear, invite your client to explore using their foresight and imagination. At the end of the workshop, what do they want to have that was not there before the start?
Intangible outcomes	What intentions are connected to the workshop in the immaterial world of communications, connections and emotions? Mark down the keywords you hear your client use. Is it a matter of increasing networking opportunities and connections? Deepening trust? These “soft” outcomes can inspire and direct your choice of activities, setting and style.
Levels of participation	This involves probing how much power is allocated to participants for shaping future choices. Will proposals selected by participants in your workshop be adopted directly? Is this a consultation process someone else will turn into a decision later? Or, perhaps, the workshop is meant to inform and get buy-in on choices that have already been made? All these scenarios are possible and valid, but it’s important to know your client’s intention so as to prevent future disappointment or confusion.

DEFINING THE TARGET AUDIENCE

Once you have clarity about the desired outcomes, it's time to focus on your hypothetical participants. You may already have a list provided by the client, or it may be a completely open invitation. In any case, after defining the "why", it's a good idea to spend some time focusing on the important question of "who?"



Things that can be **useful to consider doing at this stage**, depending on the specific situation, include:

- » Creating a "persona" for the workshop. Who will benefit? What are their needs, pain points, interests? Why will they come? This work will initially be based on your assumptions only, but it could lead to an exchange of information with your client to learn more.
- » Having interviews with potential participants to collect more information on their wants, needs and expectations. If you are able to contact participants before the workshop, aim to talk to a few. If key decision-makers will be in the room, it's definitely a good idea to ask for a half-hour chat with them!

In the case of running interviews, start by clarifying that you are talking to a few people in order to better prepare your workshop. Next, kick-start your exploration by asking them what their motivation for attending the workshop is. Listen carefully and take notes! It's good practice to have a list of questions that will be the same for all your interviewees, but also let the conversation flow naturally.

End the conversation by asking your interviewee whether they know of someone who should definitely be at the workshop, and add them to the list of potential participants!

If time does not allow for 1:1 interviews, you can also consider sending your questions out via email.

Finally, check back in with the client to ensure they have considered who should be there and whether any important stakeholders are being overlooked.

At this stage, it's also important to start making notes of any special needs. These considerations have a bearing on such key planning elements as your choice of venue, location, and timing. Getting to know your audience will ensure you design an inclusive and engaging workshop.



DRAFTING THE INITIAL CONCEPT

Once you know the “why” and something around the “who” of a workshop, it’s time to start designing the “what”.

At this stage, the aim is to create a first concept draft that clarifies the main points of the agenda. You’ll share this concept with your client, get feedback and adjust before moving ahead with a complete agenda design.

An **initial concept draft** should contain:

- » A summary of the desired outcomes;
- » A list of benefits for participants (what are their pain points that this workshop will solve?);
- » A list of learning/key objectives;
- » A description of the main activities or building blocks of the workshop.

Once you’re done with the initial concept, you’ll need to circle back to your client, share the draft and ask for feedback.

Agenda design canvas

TITLE OF THE WORKSHOP:

THE PURPOSE OF THIS WORKSHOP IS TO...

THINGS I KNOW ABOUT PARTICIPANTS:

Start time

Introduction / Check-in

Break

Check-out / Debrief / Feedback

End time

THINGS I LEARNED FROM DELIVERING THIS WORKSHOP

SessionLab

Learn more about workshop design on SessionLab.
www.sessionlab.com/blog/workshop-design

SIGNING AGREEMENTS

By the end of the vision phase, facilitators and clients should share a feeling of commitment and alignment.

This is made visible and concrete through signing agreements, contracts and/or a memorandum of understanding (MoU).

Be sure to have clarity on what is expected of you and that your initial workshop concept meets your client's expectations.



When you're working in-house, formal contracts rarely come into the picture. But the underlying need is the same: clarity and alignment before design work begins.

A brief written summary of what was agreed (the session's purpose, the desired outcomes, any non-negotiables) shared with your internal stakeholder by email does the same job. It creates a reference point you can both return to if expectations drift later, and it signals that you take the work seriously even when there's no external client relationship to formalize.

With that in place, **you're ready to move ahead** with designing your workshop!



SESSIONLAB TIP

Use a [Page](#) to capture your pre-workshop agreements in one place, and share the link with your internal sponsor.

Run similar sessions regularly? Save it as a [Page Template](#) in your workspace so you have a ready-made briefing document to fill in every time: no starting from scratch.

The first part of the workshop planning process is to align with your client on their vision. You'll collect information, set intentions and define the steps for the future workshop.

See the complete template and adjust it to your needs at www.sessionlab.com/templates/workshop-planning-template.



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

TIME	NAME	DESCRIPTION	ADDITIONAL INFO
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 .
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.
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. If at this point elements emerge that are not data and facts, just park them in the appropriate section of the board.
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 .
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.
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.
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.
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).
10:00 0	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.

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



Phase 2 – Design

In the design stage, we aim to turn our vision into an effective workshop agenda. We'll also take actions that will ensure the session can take place successfully.

This includes choosing dates and venues, creating an attendee communication plan, populating a participant list, and refining your draft into a detailed and well-structured facilitation guide. This is where things really start to take shape and you can use your creativity and insight to design something special.

ESTABLISHING TIME AND PLACE

A workshop begins to feel like it's really going to happen once you've set the date and location.

Whether you are scouting for a location yourself or not, you still need to clarify and communicate a list of requirements clearly. Don't take anything for granted! List any needs such as accessibility, type of space, and equipment such as tables. No location is going to be perfect, but the clearer your request, the closer to ideal you might get.

If the workshop is online, you still need to put it in the calendar and arrange a virtual space to hold it, such as a Zoom meeting and an online whiteboard. If it's hybrid, you'll need to do both: scout for a location and set up online resources too.

Once the location has been chosen and booked, let the location manager know how your session will work and what they can expect. Is it okay to hang posters on the walls?

Who will give you access on the day and when will you arrive?

Will participants be using outdoor spaces or do they have any access needs? What about wifi use, passwords and other tech?



Having a persona in mind might help establish a schedule. Is this a personal development workshop that people sign up for as individuals (that will probably mean running it in the evening or on weekends?) Or is it going on at the workplace? When are employees free to attend, and what will not clash with previous engagements? Will it be a one-off thing or a series?



DRAFTING THE AGENDA

For many trainers and facilitators, this is a favorite part of the process: here is where we create a detailed schedule, choose activities and methods and assemble them into a coherent flow.

However you approach the matter, you are likely to do all of these things, though not necessarily in this order:

- » Create a timeline, showing when your workshop starts, ends, and how long each section will last;
- » Check your notes from your meeting with the client, refer back to desired outcomes both tangible and intangible;
- » Refer back to information collected from participants to pinpoint main needs and expectations;
- » Brainstorm activities you believe will meet the client's and participants' needs;
- » Decide which of those activities are "must-haves" and which are optional;
- » Assess how much time each activity will take and add a bit of buffer to account for the unexpected;
- » Check that your activities are diverse enough to include people with different styles and approaches (e.g. by having both individual and group activities);
- » Add essential opening and closing activities such as icebreakers and introductions at the beginning and feedback and drawing conclusions at the end.

However you go about designing your step-by-step plan, the eventual output should be a complete agenda that makes it easy for anyone to understand the flow of the session.

Your **completed agenda** design should include the following information:

Title	A title that should be enticing and memorable for participants. Your session's title should also be clear enough to make it easy for you to find it in the future.
Objective	One or more clear objective(s). A short description of what the workshop is for, what the desired outcome or learning goal is and what action items you'll work through.
Description	A general description of the session. Key information that will guide the rest of your plan should be noted somewhere prominent. This will probably include >> some information about participants (e.g. '6 people from the customer care team'; or '24 high school students', and so on) and >> an indication of the location (Is the session in person? Online? Hybrid? Do you have a flexible set-up of chairs and tables or is it a lecture hall?).
Schedule	A basic schedule. As with any good process, once you have a beginning, middle and ending, you are well on your way. Start with these fixed elements and work from there: >> A starting time. When will you start welcoming participants? When does the workshop actually begin? >> An introduction section that can include a presentation of the workshop, your facilitation team and some sort of icebreaker or check-in; >> One or two core activities you are confident will help you and the group reach your goals, with clear timing; >> Scheduled breaks; >> A closing section that might include a debrief, feedback on the workshop and a recap of next steps; >> An ending time.

There are a lot of extra frills you can add to make your agenda shine (more on those later), but if you've got these basics covered then congratulations: **you have a workshop design!**



Essential workshop structure

Jump-start your design process with this basic structure for a generic workshop, and adapt it to your needs.

In this template you'll find the building blocks of a facilitated workshop experience, with ideas and inspiration for an opening section and a closing, and possible timings for two main activities.

Simply click on Export, then Duplicate this model to tailor this session to your group by adding your favorite exercises and the main activities you plan to run!

housekeeping/logistics energizer/icebreaker discussion presentation break exercise reflection

TIME	NAME	DESCRIPTION	ADDITIONAL INFO
09:00 0	Before the workshop	- Manage expectations in pre-workshop communications; Show up early to greet participants; - Organize the room in a setting that works for you; - Set up tech equipment such as microphones and projectors; - Distribute materials, posters, stick notes; - Take a deep breath!	For more tips on how to prepare for a workshop : A step-by-step guide to planning a workshop .
Opening section			
09:00 10m	Welcome & agenda review	Welcome participants and share key information on the agenda, purpose, and logistics.	The facilitator or host should share information on the main timings of the day, any logistics, and begin setting expectations. Clarify ending times and times of breaks, and get any practicalities out of the way so people can focus on learning. It can also be a good time to introduce the topic in a few words and remind everyone of what we hope to achieve together.
09:10 10m	Who is in the room?	Enable participants to meet one another and create (or strengthen) relationships .	Look for icebreaker activities that are appropriate to the number of participants and to the topic of the day. If you need some inspiration, look through 100+ icebreaker activities by opening the library tab to the right -> Or start with a selection of classic getting-to-know-you icebreakers here: https://www.sessionlab.com/blog/icebreaker-games/#ice-breaker-games-to-get-to-know-each-other
09:20 10m	Group agreements	Support psychological safety by sharing and/or co-creating a group contract. You may want to offer suggestions on how the group will work together during the day, then ask if anything needs discussing or adding.	Some examples of guidelines you might want to introduce are: time: will we start on the dot or wait for latecomers? confidentiality: share stories but not names/identifying details - is using phones and computers during the workshop ok or discouraged? active participation
09:30 15m	Setting intentions	Support the activation of the "learning brain" in participants by inviting them to consider, write down, and share with another person their intentions for the day .	
09:45 20m	Presentation	A short presentation of the main content for the day.	
10:05 10m	Break	Add a break early in the day to keep everyone's energy high!	
Activity 1			
10:15 50m	Activity 1	At this point, participants will have all they need to really delve into your session. The next slots are for your main activities and content for the workshop.	
11:05 10m	Debrief	Debrief the activity in plenary or use a structure such as 1-2-4-all to collect learnings from the activity.	
11:15 5m	Quick feedback	Ask for feedback on how the workshop is going, mid-way, when you still have time to make some changes!	Set up a poster with spaces for "What is going well?" and "What could go better/what would you change?" and ask people to add some sticky notes to it before taking a break.
11:20 10m	Break	Breaks support learning and help keep the energy high.	
Activity 2			
11:30 50m	Activity 2 - introduction	Introduce your second main activity.	
12:20 10m	Debrief	Enable individual reflection as well as some sharing among the different groups.	Ask to reflect on learnings from the activity and then get together with someone from a different room/breakout to share.
Closing section			
12:30 10m	Debrief	Enable individual reflection as well as some sharing among the different groups.	Ask to reflect on learnings from the activity and then get together with someone from a different room/breakout to share.
12:40 10m	Reflection	In the closing section, the objective is to accompany participants away from the workshop "bubble" and back into their daily lives. Start doing that with a reflection on the overall learnings.	Some inspiration on activities to run at the reflection stage of the workshop include: What, So What, Now What: from collecting facts about <i>What Happened</i> to making sense of these facts with <i>So What</i> and finally to what actions logically follow with Now What. Look at lessons learned with Thirty-five for debriefing. In this version, participants reflect on an earlier experience and identify important lessons they learned. They write one of these lessons as a brief item. The winner in this activity is not the best player, but the best lesson learned. I used to think... But now I think is a powerful framework to look back at what has changed because of the workshop.
12:50 10m	Feedback & closing	Collecting feedback, including in written form, is a way to help ensure learning and growth in your facilitation practice.	When collecting feedback some things you might find useful are: remind participants of why it's important: they are giving back to your practice and improving experiences for future attendees! - ask for what worked and for what could be improved; - give participants choices of how to provide feedback: some people prefer to share something on the spot, others may want to think back and offer reflections in written form and/or at a later time (see follow-up, below).
13:00 0	End	The facilitator's to-do list for after a workshop is likely to include: personal reflection & collecting learnings; follow-up with participants, sending materials, presentations, and evaluation questionnaires; - preparing and sending certificates of participation and any admin (e.g. receipts); debrief with team and/or clients; rest!	For more ideas related to learning, debrief and follow-up: Planning a Workshop - Learn

13:00

TOTAL LENGTH: 4h 00m



SESSIONLAB TIP

Already have a session plan, training brief, or slide deck to build on?

Upload it directly to the AI Assistant and it will convert your existing document into a ready-made SessionLab agenda, blocks, timing, and activities included.



See an example agenda following this structure in our essential workshop structure template.



Why is agenda design important?

A well-structured agenda is a core element of any successful session. It ensures you are well prepared, can lead the group with confidence and that you are able to achieve your desired outcomes. Here's why agenda design is such an important part of the process.



ENSURING YOU REACH YOUR GOALS

A workshop is much more than a collection of engaging and insightful activities. Workshops have purpose.

A structured agenda is how you put your activities into a coherent order and map out the journey you will guide your participants through.

Your completed agenda will also help you stay on track while facilitating and ensure the goals of your session are reached.



GETTING BUY-IN FROM CLIENTS

Once there is a basic agenda to discuss, the future workshop really begins to come to life. You can share this with your clients and collaborators in order to refine the session further and get buy-in on the concept.

The earlier you have a draft, the more time you will have to get your client's comments and integrate them into the design until it works for all of you.



ORGANIZING YOUR WORK

Even seasoned, experienced facilitators who have run similar events dozens of times still need an agenda in order to look ahead and see what needs to be done. While creating the schedule you might realise you need to do some extra research on a certain topic or review the steps of an activity you intend to run. On the day, your agenda will also help remind you of what needs to happen and when.



ORGANIZING YOUR TEAM'S WORK

A shared agenda is indispensable whenever you need to coordinate with other people who might be involved in the workshop.

Say you are going to bring a speaker in. They will want to know, at the very least, what time they should start their presentation and how long it will last.

If you are sharing facilitation duties with others, a shared agenda is where you can mark down who will be doing what. This is essential to prevent misunderstandings and work together with confidence.



DISCOVERING WHAT MATERIALS YOU WILL NEED

With your entire agenda clearly laid out, you'll quickly see what materials, handouts, or presentations you need to have ready by the time the workshop begins. Personally, this is one of my top reasons for preparing agenda designs as early as I can. I am quite slow with creating materials and presentations and want ample time to do that!



PICKING THE RIGHT ACTIVITIES FOR THE TIME YOU HAVE

As we will see, agenda design often starts by setting clear boundaries. What time does the workshop start and end? When is the lunch break? This will limit your choices of what activities and processes to use. You will have to make sensible decisions based on the time you actually have. An agenda formalizes this process and ensures your workshop will fit into everyone's schedule.



GETTING PARTICIPANTS ON BOARD

Sharing a general agenda with participants at the start of a workshop is commonly done in order to support a sense of safety and trust, and to share ownership over the workshops' success. Knowing the purpose of the session and even when they can expect a break can help participants relax and arrive at each activity prepared and ready to contribute.



REFINING THE AGENDA

Once you have a solid agenda, it's time to check in with the client. Run through the agenda to ensure you share an understanding of what is going to happen, and make any needed tweaks and changes as you go.

Start by restating the high-level purpose and objectives of the workshop before going into a deeper review of details.

This process encourages clarity and alignment and enables the facilitator to check whether the proposed agenda is fit for purpose.

This is also the stage in which to do some research into the topics under discussion in the workshop. In general, it is useful to have at least a beginner's understanding of the discussion. Ask clients to send you some papers or links to study. Look for jargon and terminology: you'll want to at least get a sense of what people are talking about and what terms to use.



CREATING A COMMUNICATIONS PLAN

Whether you are opening the workshop for participants to enroll or whether it's the host preparing a list of attendees, it's likely someone will be working to create a buzz around the event.

Often this is not handled by the facilitator directly but rather by a communication agency or office. Do your part by preparing material for dissemination and helping make sure the news reaches the right ears.

If you are not doing communication and enrollment yourself, avoid missteps (such as the advertising sending a message that is not aligned with your intention and design) by preparing a brief well in advance.

A basic communication plan for your workshop should include:

- >> How will people find out about the workshop? Where will it be advertised? What networks, groups or individuals should be reached out to?
- >> What should people know about the workshop in advance? Create a one or two-sentence description of the workshop to use in communication channels and invitations. What is the unique value of the workshop? How can you entice people to join?
- >> How will people enroll in the workshop? How can they find out more? Who should they contact to register, is it you, or the client, or should you set up an automatic registration service (such as Eventbrite)? What information do you need to collect upon registration? Do participants need to sign authorizations (e.g. for audio-video use)? Will they get a confirmation email? Automatically or through you/the client?



ESTABLISHING WHO WILL BE THERE

Many hands make light work. Now that you have your detailed agenda, you should have a clear sense of whether other people are needed to make it work. Will you need a tech host? An assistant to help with the practicalities? A video-maker? Photographer? Visual practitioner? If you need to assemble a team, it makes sense to onboard them once you know the agenda and tasks they will take on.

The other aspect of establishing who will be there is having a final (or "almost final"... there are usually last-minute surprises!) participant list. Registration can also be an interesting opportunity to collect information on your participants that might inspire some final details of the design. Furthermore, these questions can kick-start the workshop long before it begins by asking participants to start reflecting on a certain topic.

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

TIME	NAME	DESCRIPTION
09:00 0	What happens before - 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.
09:00 5m	Intention setting	Start by clarifying your intention, your personal or team "why" for doing this workshop.
09:05 10m	Reviewing materials	Look back at the information you have collected.
09:15 10m	Brainstorming activities	Make mindmaps or lists of methods, activities and ideas you have for the workshop.
09:25 10m	Prioritizing	Start making some order and deciding what activities will be the core components of your 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.
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...
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.
09:55 5m	Getting your design ready for client	Transfer your draft agenda to a format you can share with the client.

In the second and third parts of the planning process, you will draft and then refine your workshop agenda.

You'll begin by following a step-by-step process for creating an agenda and then get feedback from your client to ensure it meets their needs.

See the complete template and adjust it to your needs at www.sessionlab.com/templates/workshop-planning-template.

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

TIME	NAME	DESCRIPTION	ADDITIONAL INFO
09:00 0	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.	Before this step, you will have already: • Drafted an agenda; • Shared it with your client so they can come prepared at this 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, 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...
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. You can ask people to interrupt you at any time with questions : this will likely lead to identifying where you already have a consensus and where more discussion or work might be needed.
09:30 10m	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. Discuss main points together and collect ideas for improvement which you can take back to the drawing board if necessary.
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 .
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 .
10:00 0	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.

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 (+ - !)



ADDITIONAL INFO

Before this step, you will have already:

- discussed the vision for the workshop with your client in the previous point;
- shared (likely via email) a concept note for the workshop;
- received a go-ahead for that concept and/or some initial feedback.

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

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

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

You might want to make lists of possibilities, or put each idea on a different sticky note, or make drawings, diagrams or mind maps.

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.

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**.

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**.

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

Write up your design in a sharable format.



Phase 3 – Act

As the day of the workshop draws closer, there are some practical tasks you need to perform in order to ensure the session can go ahead.

This is the phase for getting things done and preparing for the day of the workshop. This means assembling materials, briefing your team, doing some inner work as facilitator and conducting final preps before finally running the workshop.

ASSEMBLING MATERIALS

Shopping time! The stationery shop is like a second home to most facilitators. It's time to get your gear together and fill up boxes of sticky notes, posters, and marker pens. Now things are getting real!

As the date of the workshop approaches, make sure you have all the materials you need ready at hand. This might include your presentations, virtual whiteboards, or physical goodies. You can also consider the option of having digital-format handouts to send to everyone before or after the workshop.



SESSIONLAB TIP

In SessionLab, you can add the materials you need to each activity in your agenda. You'll also find a complete checklist of your materials so you'll never forget your markers or printouts again!

Materials

Sort: A-Z



- Blocks of sticky notes, one for each participant, different colors
- Pen and paper for each participant
- Markers, different colors
- Team Canvas recreated on a whiteboard, or on a big enough piece of paper (e.g. flipchart paper, A0/A1).
- Sticky dots in different colors
- Bluetooth speaker
- Timer (throughout the session)



BRIEFING TEAM AND SPEAKERS

A few days before the workshop, set a briefing call with the client, your team and any applicable guests. Even if it seems like everything is clear and smooth, a brief meeting can surface something about your workshop that needs attention.

If you have external speakers joining, e.g. for a keynote, remember they have not dedicated the amount of time and attention to this event that you have! Brief them on who is attending, the intention of the workshop and discuss what will happen before and after their speech. As your star guests, they should feel welcome and well prepared. This will improve alignment and the overall experience for participants.

When working with a team, it's very important to know who will take care of what. Take the time to clearly define roles and responsibilities. Add the names of the people presenting or assisting each section to the agenda with clear timings and expectations.

You might also have pre-workshop communication you want to send out to participants. This might include reminding them of logistics or to do some prep work. Always include a way to contact you (or someone from your team) if something happens at the last minute!

WORKING WITH OTHERS

Few workshops are truly solo efforts. Whether you're co-facilitating with a colleague or handing a session off to another facilitator, the quality of your collaboration directly affects the quality of the session. Here are some tips that support collaboration:

- >> Keep a single source of truth for your session and share it;
- >> Clearly define your roles, who will do what;
- >> Before the session, discuss what truly supports you to show up at your best;
- >> Take time to debrief together and reflect after each session.

GOING WITH THE FLOW

Step by step, you have now reached this exceptional threshold. People have assembled in a physical or online space equipped with all they need to learn and grow together. The workshop is about to begin!

This is what all the preparation work was for: take a deep breath and delve into the agenda. Skilled facilitators know how to read the room, trust their instincts, and stick by the plan or change it, depending on what is needed in the moment.



LEADING ACTIVITIES

An event agenda typically includes sections with speakers: parts of the day where information is presented by the host/client, a department manager, or the team presenting a challenge.

When it comes to running participatory activities facilitators take the stage to introduce, give instructions, lead debrief sessions and clarify any questions. In such moments, facilitators will:

- >> Welcome participants, introduce the process;
- >> Propose activities that help co-create psychological safety, build a healthy group dynamic and set up a good environment for the day. These could include ice-breakers, energizers, creating ground rules, exploring personal motivations, and so on;
- >> Lead activities to encourage ideation, new ideas, creativity, brainstorming (divergence);
- >> Guide activities designed to reach a conclusion, such as consensus building, defining action plans, next steps, and finalizing outputs (convergence).





MODERATING CONVERSATIONS

During conversations and discussions, facilitators use their moderation and meeting management skills to:

- >> Direct the traffic of conversation. Facilitators will often use talking pieces, pair and small group discussions, active listening and timeboxing techniques to guide the group. Facilitation does not necessarily mean “everyone will have exactly the same amount of time to speak” (though sometimes it might) but it should mean everyone gets the opportunity to express their opinion. Whether it’s in written form with sticky notes, in turns, or in a myriad other ways. Facilitators will encourage everyone’s participation but should not enforce it! Some people prefer to be quiet and that is also ok;
- >> Step in to suggest ways of working through conflict. Not all facilitators have mediation skills, but expert professionals will have an understanding of how to handle conflict creatively and constructively;
- >> Summarise the conversation, ask clarifying questions, or suggest topics that push the group to go further in its thinking;
- >> Manage time and take meeting notes, or set in place mechanisms to do that collaboratively.

RUNNING A WORKSHOP LIKE A FACILITATOR

Running a successful workshop means leveraging many facilitation skills to help your group achieve great things. Whether you are a skilled facilitator or new to the practice, here are some facilitation principles that will help you run an engaging, effective workshop.



NEUTRALITY AND IMPARTIALITY

Neutrality in facilitation is about enabling group members to discuss and explore possible solutions without steering them toward a predetermined answer. In practice, this means asking the right questions and creating space for all voices to be heard and given equal weight, and it takes real practice to do well.

This is especially nuanced when a manager or team lead is running the session. If you're in a leadership role, be transparent with your group about when you're wearing the facilitator hat and when you're stepping back into the decision-maker role.

HAVE A PLAN BUT BE PREPARED TO CHANGE IT

Planning is important, but using your intuition to identify when things need to change in order to achieve the goals of a session is vital too.

This can look like changing an activity because it's not working or realizing your group should explore something in more or less detail in order to achieve your desired outcomes. Pay attention to group dynamics or if you feel things aren't going well, simply ask the group how they feel.

Finding that sweet spot between preparation and flexibility takes practice, but it's an important job. Be prepared by first creating a great agenda, consider a few contingencies and then aim to be fully present in the session.





EVERYTHING IS IN SERVICE OF THE GROUP

Facilitation is all about guidance, rather than prescription. Facilitators create a structure that encourages the group to participate and create solutions collaboratively. The facilitator's job then, is simply to help the group do their best work together!

When it comes to enabling the group, the facilitator ideally stays on the sidelines and guides participants to find their own outcomes. Remember to act on behalf of a group and help service your participants with tools, guidance and a supportive environment.



FRICTION IS WHERE THINGS HAPPEN

Lively discussions, differences of opinion and new ideas are common occurrences in a well-facilitated workshop. Helping groups explore tricky problem spaces can be emotionally charged. It's the facilitator's job to guide a group through this process while maintaining psychological safety and mutual respect.

In practice, this means creating space for vulnerability and curiosity. A facilitator also manages group dynamics and may set ground rules to ensure participants treat one another with respect and empathy, including when they disagree.

You can use facilitation techniques designed to support the process and carefully develop your facilitation skills in order to learn how to hold this space.



PARTICIPATION AND INCLUSIVITY

One of the most impactful mental shifts you can make as a facilitator is to put participation first. Moving from “I do this” to “we do this together” is one of the best ways to start putting facilitation into action, whether you’re working with students, employees or peers.

Try setting ground rules at the beginning of a session to create safety, address power dynamics and move forward with an agreement of how people should treat one another.

Facilitators also encourage everyone to participate and practice active listening during discussions. All of these things might seem small, but when put together, they set the foundation for a productive and inclusive session.

TAKE CARE OF YOURSELF

Don’t be surprised if you are tired at the end of a workshop! Holding space for others can be draining and there are lots of things to keep in mind. Consider how you will keep yourself energized throughout the session. Whether it’s a favorite snack, meditation, keeping hydrated, taking your lunch break outside, find whatever works for you!

Rest, celebration and reflection are so vital to a facilitator’s well-being that it’s a good idea to block some time in your agenda for that as well. Include a note at the end of your personal agenda to ensure you will have a learning, debrief and/or appreciation session after the workshop is ended.



SESSIONLAB TIP

Use SessionLab Forms to collect feedback straight from participants after your session. Ask them how it went, what worked, and what could be better, then use those responses to reflect on your practice and improve.

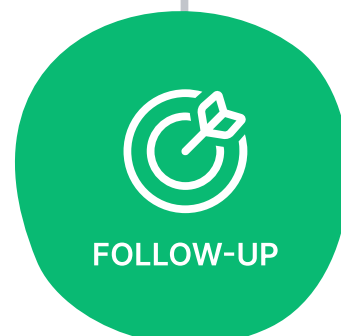


- 🗣 Interviews
- 📐 Design
- 📄 Research
- ✉ Communication



- 🚦 Directing traffic
- 👉 Holding space
- ✍ Summarising
- 🕒 Time-keeping

- ✓ Check-in / check-out
- ⚡ Energizers
- 💡 Ideation
- 🔑 Decision-making



- Report 📖
- Debrief 🗣
- Improve ★



Phase 4 – Learn

The workshop may be over but the work is not! Learning and reflecting is just as deserving of your time, energy and commitment as any of the other phases. This is the step where we truly grow and become, with time and experience, wise and excellent facilitators!

In this learning phase, we aim to close a cycle mirroring how it was opened. This means continuing a dialogue with our client and making time to think back together. Such reflections are too often swept aside in the hustle of business cycles. Yet, the more space we can make for them, the better.

As we learn together, we consolidate trust and strengthen partnerships. Reflecting and celebrating also builds momentum for the next cycle, which is just around the corner!

One-hour Brain Sprint

A simple recipe inspired by the Design Sprint to get the most out of a brainstorming session and to be concise.

Objectives:

- Effectively generate ideas while avoiding the common pitfalls of regular brainstorming sessions.
- Be concise and timebox all of the exercises to ideate faster.
- The brain sprint aligns a group of creatives and avoids discussions.

(GMT+02:00) Vienna

TIME	NAME	DESCRIPTION	MATERIALS
09:00 5m	Expert Interviews	The expert interview is an exercise from the Design Sprint where we bring the people with specific knowledge into the room. Usually we have the project manager who has spoken to the client as an "expert", and we suggest to take the design lead in also.	• Post-it notes • Timer (throughout the session)
09:05 10m	User Insights	Note the facts and stick them.	• Post-it notes
09:15 15m	Lightning Demos	The lightning demo is an exercise from the Design Sprint, which is like a short research session: inspire the team with product or services that they may use as an inspiration during the brainstorming.	• Post-it notes
09:30 5m	Notes	Generate an initial round of ideas individually.	• Music • Post-it notes
09:35 3m	Vote	Look at all the ideas and get people voting on the most liked ideas.	• Sticky dots
09:38 12m	Wrap-up → Execution	By the end of the session, you must decide what to do with the ideas. What's the project? Who will the ideas be presented to? We usually divide up the post-its to all the designers in the group and each	

REPORTING

Agreements taken with your client might include contributing to a final report. Even if they don't, it's a great idea to take some time to reflect and write up a summary of what happened. It will be invaluable in time, e.g. when two years down the line a client calls you back to ask: "Could you do that workshop again?"

A **workshop report** generally includes two main parts. One is about information, the other is focused on learnings.

Information on the workshop

The first part of your report is a collection of data about the workshop. When and where was the workshop held? How many people attended? What was the schedule? You'll also want to include:

- >> Workshop concept
- >> Agenda
- >> Data on attendees (e.g. how many people attended, and whatever data about them is relevant and can be shared)
- >> Pictures from the event

Learnings from the workshop

The second part of the workshop report is more subjective. This is the place in which to include reflections on how it went, a summary of key conversations and discussions, recommendations and notes on methodology. This section will include:

- >> Reflections on the methodologies chosen
 - >> Facilitator's notes and observations
 - >> Feedback received
 - >> Key recommendations or decisions taken.
-



SESSIONLAB TIP

In SessionLab, you can export your workshop agenda in a format that works for you. Customize your printout and add it to your report to clearly articulate what you did and show value.



FOLLOWING-UP

Presenting a report and opening it for final revisions is a great excuse to set up that precious follow-up meeting with your client.

Reserve a chunk of time to look back at your work together and reflect. What went well? What would you change next time? This is a time for constructive feedback, expressing appreciation, and taking care of your relationship.

Besides following up with your client, you also may have some follow-up actions to take with participants.

Here are some ideas of what that may include:

- >> Sending certificates of attendance with the number of hours spent at the workshop and the main topics covered;
- >> Sending lists of extra materials, bibliographies, and resources;
- >> Collecting feedback through a questionnaire;
- >> Inviting people to subscribe to your mailing list, follow you on social media, or providing ways for them to stay in touch.

For more actions that can improve the impact of your work, beyond the individual session, download [SessionLab's free Guide to High-Impact Facilitation](#). It covers practical frameworks for designing impact in from day one, tracking what actually changes, and making your results visible.



SESSIONLAB TIP

SessionLab Forms comes with customizable templates.

Use the Workshop Feedback form to capture participant feedback to use in your post-session reports.

← **Add a form**

SUGGESTED TEMPLATES

- Workshop feedback ✓
- Needs Assessment Survey
- Group check-in
- Participant questionnaire
- Meeting retrospective



COLLECTING LEARNINGS

The follow-up and reporting steps are primarily performed for the benefit of clients and participants. While you write these up, it's likely some takeaways will emerge about your work and practice. Note these down though be sure to also take time for deeper personal reflection. If you are part of a community of practice or professional development program, it can also be useful to debrief the workshop with your peers, coach, or mentor.

At the very least, quickly jot down some notes or a mental map in response to the following three questions:

- » Regret – what happened at the workshop that I regret, am worried or sad about? How did I feel about that? Do I know why it happened (what needs was I trying to satisfy?)
- » Celebrate – what happened at the workshop that I really celebrate and am glad about? How did that feel? What needs of mine were met?
- » Learn – with those things in mind, are there any learning points I want to learn from and remember?

You may also want to add some notes next to certain activities or sections of your agenda. Maybe you'll adjust a method for next time or scrap something all together. Where possible, make small notes during the session and then come back when reflecting. These insights can be invaluable when it comes to designing your next workshop.

CELEBRATING

Celebrating can mean different things to different people.

Different actions might help you feel like the circle is closed. Try writing up your notes, take a relaxing break, go out for dinner with your team members or buy yourself a small gift. Do whatever helps you keep your energy level high and integrate the experience into the flow of your life.

Processing reflections and giving them some time to settle is likely to lead to the next great idea. How about we took this learning from this workshop and did something new with it? These thoughts are a clear sign that a new cycle of ideation is about to begin!

Putting it all together

In this section we have seen a comprehensive, step-by-step process for workshop planning: from ideation all the way to reflection.

As you can tell by now, creating engaging experiences to promote collaboration can be a lot of work. It requires great planning, team alignment and project management skills too.

Depending on the context, not all these steps are always necessary. If you are creating a workshop for an in-house team, you might not need to do much in terms of outreach or communication. We hope that having a full overview of the process has given you a sense of what steps you need to pay particular attention to when planning your next workshop.

In the next section, you'll find some tips and best practices for agenda design we've learned from collectively designing and running hundreds of workshops.

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

TIME	NAME	DESCRIPTION	ADDITIONAL INFO
09:00 0	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.)	Before this step, you will have already: Confirmed the final agenda with your 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 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! Invite a check-in round with a personal (but not too personal) question.
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.
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 .
09:40 10m	Q&A	Make space for questions and last-minute requests.	Open the floor for any questions and/or requests .
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?"
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 .
10:00 0	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.

10:00

TOTAL LENGTH: 1h 00m

Workshop plan

This 1-hour facilitator/client time for appreciation, an

For more details on work

energizer/icebreaker

TIME

09:00
0 What happens
CONTEXT

09:00
5m Check-in

09:05
5m Introduction

09:10
0m Appreciation

09:20
0m After Action

09:50
0m Checkout

TOTAL LENGTH: 1

MATERIALS

- ☐ Talking piece x 2
- ☐ A talking piece in
- ☐ Random name p
- ☐ flipcharts in After A
- ☐ sticky notes in After
- ☐ markers in After Act



The fourth part of the workshop planning process is to brief your facilitation team. You'll review the agenda, answer questions and assign roles and responsibilities.

In the fifth part of the process, it's time to collect learnings. You'll reflect on the workshop, share appreciation and begin looking to the future!

See the complete template and adjust it to your needs at www.sessionlab.com/templates/workshop-planning-template.

Planning template - Part 5 - Collecting learnings



ent meeting is dedicated to collecting and sharing reflections and feedback after a workshop. It includes some after-action review, and any possible next steps.

shop planning, you can read SessionLab's [Step-by-step guide to planning a workshop](#).

exercise ■ discussion/debriefing

NAME	DESCRIPTION	ADDITIONAL INFO
ns before -	This is the last meeting of the series. It is a space for reflection, learning and consolidating a professional relationship.	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.
	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?"
n	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. If you aim to include feedback from this meeting into the report, mention this as well.
n 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.
n 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/
	A final round of sharing and thanks.	Complete the cycle by asking everyone to share one learning they are taking home from this experience.

h 00m

in Check-in | Checkout

o Appreciation relay

icker in Appreciation relay

ction Review

or Action Review

ion Review



SESSIONLAB TIP

Use the SessionLab Team Library to store your best sessions and activities in one shared space.

Turn any agenda into a template your whole team can access, duplicate, and adapt. It's the simplest way to build consistent quality across your organization without starting from scratch every time.



10 tips for effective agenda design

We've covered everything you need to plan your first workshop and create an effective agenda. But how might you improve your design? What should you keep in mind if you want to lead workshops at the highest level?

While practice and experience are great teachers, learning from other facilitators is another way to fast track your development and design better workshops. In this section, we share some of our top tips for taking your workshop agenda from good to great.



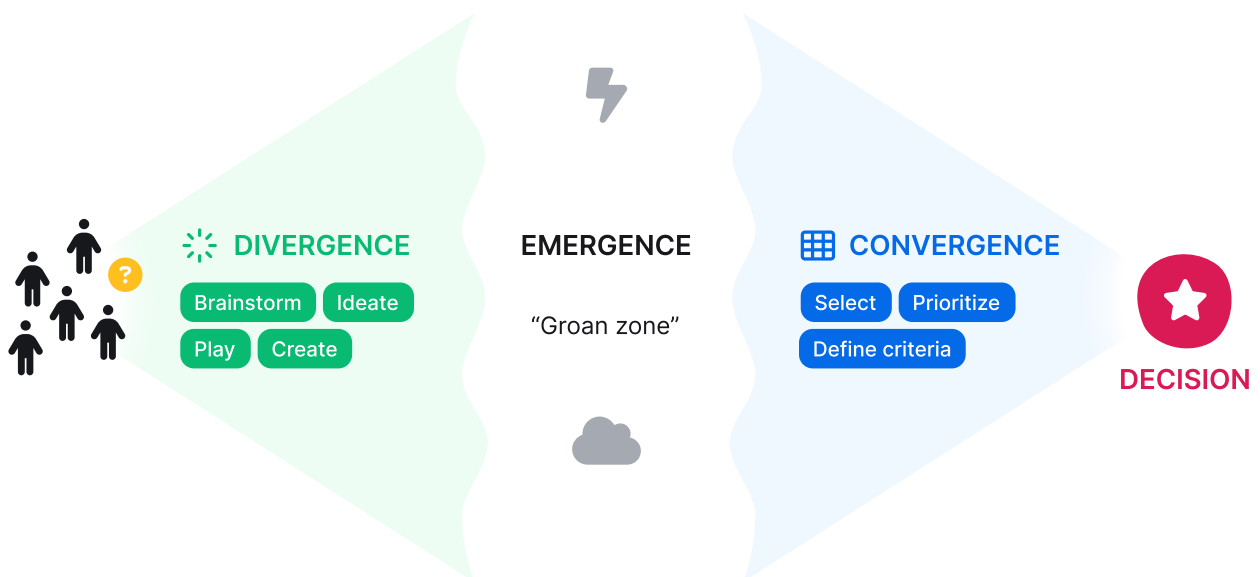
TIP 1

Start with an outline and zoom in on the details

When working on your agenda design, start with a general outline and fill in the details later.

This rough skeleton will help you create a coherent flow and determine what is essential before you dive into specifics. A simple outline is also essential for communicating with your clients and participants.

In practice, this might mean designing your session around an existing flow or a series of steps such as “Past/Present/Future”. One commonly used sequence, especially if your desired outcome is a decision, is based upon Sam Kaner’s diamond of facilitation.



In this model, a group of people comes together to face a shared challenge. The **first phase** they go through is called divergence. This is all about creatively generating as many ideas and potential solutions as possible.

The **second phase** is emergence, also known as the “groan zone”. This is where conflict might emerge, often showing up as tension between two apparently incompatible sets of plans. This is a great space for asking questions, inviting the group to delve deeper, and offering activities to look at the dilemma from a different perspective.

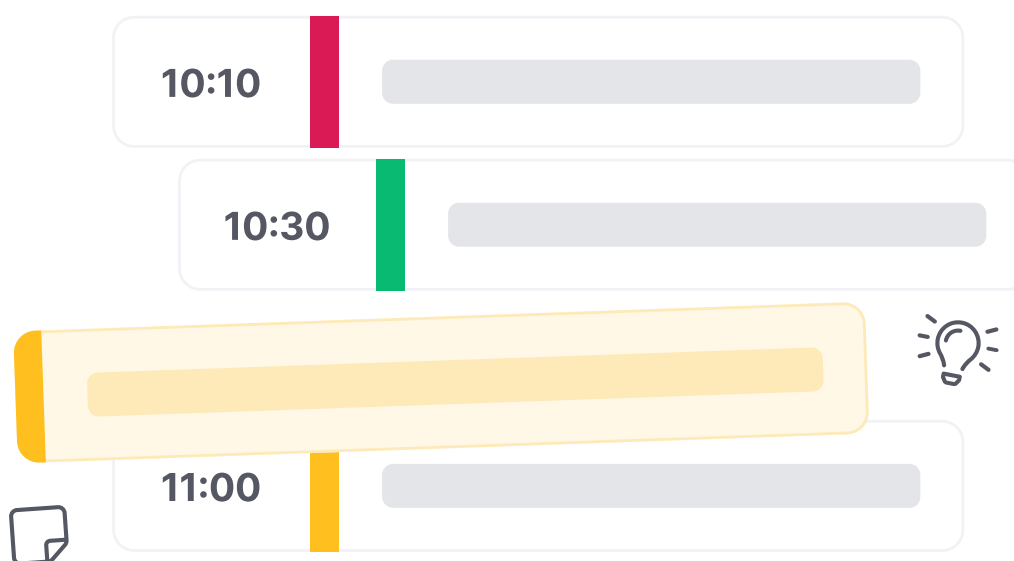
The **third step** in this sequence represents a shift from discussion towards action! Time to move to convergence, a phase in which it’s important to be practical and realistic about such things as time and resources. Define criteria to narrow down options, select and prioritize.

The diamond of facilitation is just one of many possible structures you can base the overall narrative of your design upon. Once you’ve got a structure that works well for you, use it as a template for similar sessions to save time and effort creating your outline in the future.



SESSIONLAB TIP

Organizing your raw ideas and putting things in sequence is one of the first steps of designing an agenda. In SessionLab, drag, drop and reorder your blocks to quickly sketch out your idea before adding more details and timing.





TIP 2

Build the agenda around your participants...

Once you have a general outline of your agenda, you'll need to start populating each step with activities. When selecting or inventing activities, it's important to remember that a workshop is about the participants, and not about you.

Many of your choices will be influenced by the number of expected participants. 6-person events are different than those with 25 or 100 people. With groups of more than 12, design for more small-group or paired activities. With large numbers, you will need extra equipment and, probably, a team of co-facilitators.

What else do you know about this group? How formal or informal is the scenario? Let go of your favorite facilitation techniques, activities or style if they do not suit the group you are working with.

Building the agenda around your participants also means empowering them to take ownership of their pathway and learning. As the workshop progresses, the focus of attention should progressively shift from yourself (and perhaps your host, who may want to introduce the day) to the participants.

Ways of working a thread of empowerment throughout the workshop are many, such as assigning roles to participants or having appreciative inquiry-inspired activities that focus on having participants share stories around what they already know how to do well.

TIP 3

...and around the location

Location is an important aspect of agenda design. You should know from the start if you are working in real life, online, or in a hybrid format.

A facilitator's wish list for the ideal location will probably include:

- » a flexible arrangement, with chairs and tables that can be moved around the room and enough space to move around smaller breakout spaces;
- » accessibility for any participants with movement impairments;
- » natural light, access to the outdoors;
- » walls or windows that can be used (respectfully and carefully!) to hang posters on.

Location considerations such as these will influence your choice of activities. If the room does not allow you to comfortably move around, for example, certain dynamics will be off-limits. You may also need to organize space for equipment or group work.

If the workshop is taking place online the choice of software will be a determining factor in what activities are and are not possible (such as placing participants in breakout rooms).

Pick a tool you are familiar with and be sure to check your tech before running the session.



TIP 4

Time is of the essence



Timing will massively influence what activities you can use. Begin your detailed plan by noting down the start and end time, and remember to add a generous sprinkling of breaks!

During the workshop, the group will rely on you for timekeeping. This premise often leads to tension or conflict when participants are living in the moment and the facilitator is the only one imposing an agenda and looking at the clock.

Avoid this pitfall by enlisting the groups' support. Make space for a short conversation and create a group agreement concerning time. This is especially important in intercultural contexts or when online participants are calling in from different timezones.

Some other ways you can **get time on your side** when preparing a workshop include:

- » having a timepiece and a large, visible copy of the agenda on display
- » having a pleasant sound to call people back after a break or to end an activity
- » beware of “hearing back from each group” after small-group activities! You might ask for a single sentence summary or set up a sticky notes wall of insights in order to save time.
- » note in your agenda which activities you are ok with skipping if needed, and agree on this with your co-facilitator or facilitation team
- » use flexible activities as necessary. Activities with multiple rounds such as World Café are effective ways to respond to the needs of the session without needing to come up with something new on the spot.



SESSIONLAB TIP

In SessionLab, set timing for each block to create a minute-perfect agenda. When you make changes or add new activities, SessionLab automatically adjusts your session timing.

9:00 AM

– 25m +

Expert Interviews

The expert interview is an exercise from the Design Sprint where we bring the people with specific knowledge into the room. Usually we have the project manager who has spoken to the client as an “expert”, and we suggest to take the design lead in also.

9:25 AM

10m

User Insights

Take note the facts and stick them on the wall in a gallery layout. Typical items the experts may present: a user research project, or research th

TIP 5



Include different types of activities

A good workshop design will be dynamic and varied, with a bit of something for everyone.

Some of us prefer to learn by doing, others want theoretical content they can mull upon. Many people appreciate small-group activities, perhaps using a visual canvas to fill in with ideas. Later in the day, the very same people might also want to reflect on their own, perhaps by journaling to some soft music.

Keep your agenda varied by creating sequences of individual, paired, small group and plenary activities. A dynamic agenda helps keep a group engaged and ensures your goal of having an enjoyable and effective workshop is met.

Generally speaking, we tend to default to activities that satisfy the needs of people most like us. Step out of your comfort zone by adding something a completely different kind of person might benefit from (such as quiet reflection if you enjoy high-energy dynamics, or using art and crafts if you lean towards academic presentations).



SESSIONLAB TIP

By color-coding activities by type, you can see at a glance how balanced your workshop is. Do you need a break? Do you have too many theory heavy activities? SessionLab makes it easy to see a visual overview of your agenda and make changes.

Block categories

-  Exercise
-  Theory
-  Discussion/Debriefing
-  Break
-  Energizer/Icebreaker

+ Add new category



TIP 6

Keep the goal in mind (and share it)

A clear purpose is the foundation of your agenda. It can also help when choosing which methods, tools, and techniques to use.

Writing a one-sentence description of the workshop's purpose is a good way to start designing. If your purpose is "to reawaken creative thinking and playfulness in the team" you have solid, incontestable reasons for pulling out art supplies!

Design for one key outcome, trim the rest. Try not to cram too much in the same agenda and keep people's attention spans in consideration. Attention will be at its highest in the first couple of hours of the workshop. Treat it as the precious thing it is and think carefully about which activities need the most brain power, so you can place them in the appropriate slot.

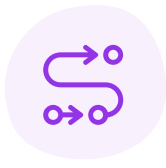
Sharing your objective is also key to managing participants' attention. Adult learners need to have clarity about why they are being asked to do things, while children are more likely to jump into activities with glee. Don't be afraid to reiterate the rationale behind the whole workshop with your audience.



SESSIONLAB TIP

Invite collaborators and clients to leave feedback on your SessionLab agenda and ensure it will achieve your desired goals. No more sending documents back and forth or losing track of comments.

A screenshot of a web browser displaying a SessionLab agenda. The browser's address bar shows 'sessionlab.com'. The agenda title is 'One-hour Brain Sprint'. Below the title is a subtitle: 'A simple recipe inspired by the Design Sprint to get the most out of a brainstorming session and to be concise.' The 'Objectives' section lists three bullet points: 'Effectively generate ideas while avoiding the common pitfalls of regular brainstorming sessions.', 'Be concise and timebox all of the exercises to ideate faster.', and 'The brain sprint aligns a group of creatives and avoids discussions.' A legend shows five categories: Decision making (orange), Present information (blue), Group discussion (grey), Idea generation (green), and Design (purple). The agenda is for '(GMT+02:00) Vienna' and lists four activities: '09:00 Expert Interviews', '09:05 User Insights', '09:15 Lightning Demos', and '09:30 Notes'. To the right of the agenda are three overlapping circles: a pink circle labeled 'Client' with a briefcase icon, a yellow circle labeled 'Team' with a group of people icon, and a blue circle labeled 'Participants' with a group of people icon.



TIP 7

Create space for improvisation

And what about improvisation, you may be thinking at this point, and the flexibility facilitators are famed for?

Try thinking of a good agenda design not as something that hinders improvisation but rather a great scaffolding to dance upon. If the scaffolding is solid enough it will allow for changes while enabling you to keep track of what is important. This means you can improvise while still moving in the direction of your goals and desired outcomes.

A good agenda with a solid structure is a great foundation for flexibility. When designing, you can also take some steps to make future improvisation easier. Here are three ways you can create flexibility in your agenda:

Spend some time considering what could go wrong and adding a Plan B in points of the agenda. If you have an outdoor activity, for example, what will you do if it rains?

Add a symbol or note next to any activities you are fine with skipping if there is not enough time. Going overtime is a common occurrence so it's good to be prepared for it.

Make your agenda spacious. Filling every bit of the plan to the minute is likely to put pressure both on you and the participants. Add a bit of buffer time around core activities or after a break to allow for the unexpected to emerge.

TIP 8

Keep everything together

Besides the general outline of your session, there are some other sections you can add to your agenda to make sure you have everything you need in one place.

These include:

- >> A list of materials. Whether it's keeping track of pens, post-its and printouts or collecting links to online materials, attaching these to your agenda in SessionLab means you can ensure you have everything you need on the day.
- >> A checklist of tasks. Create a checklist of what you need to do on the day, such as preparing a presentation, checking your tech or setting up the room so you don't miss anything. A pre-flight check can make all the difference when it comes to facilitating with confidence.
- >> A pre-workshop section. Note down how you will interact with participants before the session, and use a SessionLab Form to collect any information you need from them in advance, from dietary requirements to learning goals.
- >> Post-workshop tasks. Send resources to participants, share your session report via a SessionLab Page, or collect feedback through a Form attached directly to your session



SESSIONLAB TIP

SessionLab is built to keep everything in one place.

Use Pages to create a polished facilitator guide combining your agenda, instructions, and materials in a single shareable link.

Attach a Form to collect pre-workshop information or post-session feedback.

Store approved sessions and templates in your Team Library so every facilitator starts from the same foundation.

Key materials & Equipment

Most importantly, you'll find the [complete agenda for the training session](#) attached. We recommend printing out the agenda to support training delivery on the day and reviewing it in full beforehand.

Materials	Equipment
Copies of handouts (Feedback guidelines, Scenarios, Observer form, Parser form)	Laptop and projector
Flip chart paper	Effective Feedback presentation slides (attached)
Markers	Timer with audible ringer

TIP 9

Share your agenda

Who should you share your agenda with?
There are four different possible recipients of an agenda design: yourself, your client/host(s), your facilitation team, and your participants.

While all these agendas will contain the same basic structure, they will likely contain different levels of detail.

Ensuring everyone involved in the workshop has the information they need will help make the workshop a smooth, efficient process. During the planning stage, you'll want to share a lean, easy-to-understand agenda with your clients so they can give sign-off and get aligned on the process.

When it comes to running the workshop, you'll want to share a more detailed agenda containing logistical notes with your facilitation team. This might include a role call of team roles and responsibilities, technical instructions or even a script.

It's a great idea to share a high-level agenda with participants before the day of the workshop or during the introduction. This doesn't need to include everything in your plan, but it is common practice to share a general overview, end time and any scheduled breaks.



SESSIONLAB TIP

Share a beautiful printout of your SessionLab agenda with clients and participants to get feedback, buy-in or prepare them for the workshop. Customize to your needs by adjusting the level of detail and format.





TIP 10

Beginnings and endings

Great facilitators are adept at managing the transition between the “outside world” and the workshop session.

Carefully design your opening and closing activities to guide attendees into and out of the experience.

Remember that participants often have busy lives and minds. Ease everyone into the workshop with check-ins, introductions and other activities designed to facilitate psychological safety.

End with time dedicated to debriefing, capturing learnings and crafting action plans and next steps. This ensures the workshop stays relevant to daily life in the “real world”. Add a memorable activity at the end, as well as some time to collect feedback for yourself, with the aim of continuously improving your practice.



SESSIONLAB TIP

In SessionLab, you can search for a workshop activity and immediately add it to your agenda. With over 1000 methods in our public library, you can find the perfect technique to delight participants and help you meet your goals.

Doodling Together

#collaboration #creativity #teamwork #fun
#team #visual methods #energiser #ice breaker
#remote-friendly



Create wild, weird and often funny postcards together & establish a group's



W³ - What, So What, Now What?

#issue analysis #innovation
#liberating structures



You can help groups reflect on a shared experience in a way that builds understanding and spurs coordinated



Leadership Pizza

#leadership #team #remote-friendly



This leadership development activity offers a self-assessment framework for people to first identify what skills,



Team Canvas Session

#team alignment #teamwork
#conflict resolution #feedback #teambuilding
#team #issue resolution #remote-friendly



The Team Canvas is Business Model Canvas for teamwork. It is an



Break the Ice with The Four Quadrants Activity

#team #icebreaker #get-to-know #teambuilding



The Four Quadrants is a tried and true team building activity to break the ice with a group or



Walking questions

#what if learning style #idea generation
#learning



This is a great facilitation technique to answer open questions of trainees with a "What if" learning style. It prevents the



Rock, Paper, Scissors (Tournament)



Looking Around

#thiagi #concept
#energiser

Here's another job themes: You have to learn something

LEGO Challenge

#hyperisland #team



Appreciations

#team #appreciation



Conclusion

Workshops are powerful spaces for creating a collaborative environment that helps groups achieve their goals.

There are few problems that cannot be solved by getting the right people together in a well designed and expertly facilitated program.

With the four step planning framework, you have all the tools you need to design more effective sessions and improve your facilitation practice. Starting with vision, you'll ensure that all stakeholders are aligned on your purpose and goals.

By then designing an effective agenda with a clear structure, you'll be fully prepared to deliver an engaging and productive session.

When you're done, collect learnings, follow up with clients and refine your process to make your next one even better. SessionLab supports you at every step: from your first draft agenda through to collecting feedback, building a team library of reusable programs, and scaling consistent quality across your organization.

Are you part of an organization, and considering how to take your facilitation to the next level? Take SessionLab's [free Facilitation Maturity Assessment](#) to find out how strong your facilitation practice is and get practical next steps for improvement.

The positive impact of a workshop goes beyond a single session. By building a workshop culture in your organization, you show a commitment to improving collaboration and engaging the creativity and intelligence of everyone in your team. An effective workshop is where this kind of positive transformation begins.

Are you ready to start?



Expert facilitators love SessionLab

www.sessionlab.com

An amazing tool that has completely transformed the way I can both prepare and keep records of my workshops.



Erica Marx

Online Events Producer & Facilitator

SessionLab helps our colleagues save time designing the right process. It helps us prepare meetings and workshops on a better level which directly leads to achieving business goals faster.



Verena Köppel

Transformation Expert, Haufe