

Workshop Checklist

Coremotif
Management
Consulting



Introduction

To help you facilitate the best workshop possible we've compiled a list of items to consider.

Step 1: Workshop Objectives, one or two weeks before

- Review the business strategy and identify the strategic problem to address, this could be building capabilities, identifying opportunities or map processes to name a few examples.
- Identify key stakeholders. These are usually managers of the employees participating and other people instrumental to implementation.
- Discuss the objectives with key stakeholders to get their buy in and support
- Adjust workshop objectives following the discussions.
- Clearly document the objective for the workshop. This will be the main driving force and a great alignment tool later.
- Decide how you will record the workshop's deliverables if any. This can be done using Post It notes, idea worksheets, or any other suitable form.



Step 2: Attendee list, one or two weeks before

- Based on the goal you identified make a list of who should attend. If your intention is to solve a problem, we recommend having fewer than 10 attendees. If the goal is education or building capabilities, the list of attendees can be a lot longer.
- Make a list of the people that need to be on the workshop and remember to leave a few openings for last minute changes. Be prepared that the list might change when the workshop closes in.

Step 3: Location, one or two weeks before

- Based on the number of people on your attendee list, their status and requirements you can start searching for suitable locations. Make a list of the most suitable locations.
- Eliminate from the list. If they are internal, make sure they are available for the time required to narrow the list of suitable locations. If they are external, call them and ask if they are available and what they cost. Based on that you can narrow down the list of locations.
- Pick the one that's best and reserve it.

Step 4: Agenda, a few days before

- Develop a list of main points to discuss.
- Check the main discussion points against the strategic problem you identified and the goal of the workshop. Adjust if necessary
- Draft the agenda, what points will you address, where and when.
- Review the agenda and make sure that the attendees have time for bio breaks, refilling coffee cups and small talk.
- Define a list of the visual aids required, such as slides, graphs and other images.



- Make the visual aids, make sure to test them on somebody you know to make sure they are easily understood and that they communicate the information required.

Step 5: Follow up

- Make a draft of a follow up plan for the deliverables of the workshop. Projects need prioritization, documents need approval, etc.
- For each of the items on the follow up plan, identify who to contact, what the requirements are for them to process the deliverables from the workshop and how they'll notify you when they have been processed.
- Design a communication plan that you can use to communicate to the stakeholders what happened to, and the progress of any workshop deliverables.

Step 6: Have an awesome workshop

- On the day of the workshop, show up early and make sure:
 - All equipment is working
 - Seating arrangement is as it should be
 - Any environmental issues are addressed, such as air-conditioning and sunshades.
- Greet everyone when they show up and tell them about the facilities, restrooms and other important points that they need to be familiar with.
- Start the workshop and introduce yourself
- Make sure to mix different people in different groups to facilitate cooperation
- Record the ideas from the group, use photographs, post-its, idea worksheets or any other suitable means.
- Have fun