

From the website <http://www.mindtools.com/pages/article/PlanningAWorkshop.htm>

Planning a Workshop

Organizing and Running a Successful Event



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Anyone who has ever planned a workshop will tell you that it's a big job. And planning a good one? Well, that takes organization, focus, and a lot of creativity. So how do you prepare for a workshop that will be not only relevant and productive, but memorable?

Some people **hate** going to workshops. Done wrong, they can be a huge waste of time and money. However, if they're planned well, they can be incredibly valuable for everyone involved. Workshops are great for brainstorming, interactive learning, building relationships, and problem solving. This is why advance planning is critical.

Before the Workshop

Follow these steps to make sure your workshop is a valuable experience for everyone:

Step 1: Define the Goals

Every workshop must have a goal. Do you need to improve your company's hiring procedures? Do you want to teach managers how to be better organizers? Do you need to do some team building with a newly formed team?

Many workshops are a waste of time because there's no clear goal kept at the center of the discussion. Without this clear goal, there's really no point in getting people together.

Step 2: Decide Who Will Attend

Knowing who will attend directly relates to your objective. For example, if your workshop's goal is to develop a detailed solution to a problem, then you probably want 10 or fewer key attendees. If your goal is centered on education, then you might be happy with a much larger group, which divides into smaller groups for discussion.

Make a list of who needs to be there. Try to be as specific as possible, but leave a few openings for last-minute additions.

Step 3: Choose the Right Location

If you have 10 attendees, then the conference room down the hall will probably be just fine. But if you have 50 people, you may have to find an outside location that's large enough.

Think about the logistics and practical details of your workshop when you choose the location. Will everyone be able to see your visual aids? If you need a certain technology, like teleconferencing, will the location support it? Are there appropriate facilities for breakout sessions? Will everyone be able to reach the venue? Will you need to organize accommodation for people who are coming from a long way away? And what catering facilities does the venue provide?

Step 4: Create an Agenda

Now that you know your primary objective and who will attend, you can start to develop an outline of how you'll achieve the workshop's goal.

- **Main points** – Create a list of main points to discuss, and then break down each larger point into details that you want to communicate to your audience.

- **Visual aids** – List the visual aids, if any, you'll use for each point. If you need technical support, this helps the people providing it to determine where they need to focus their efforts.
- **Discussions and activities** – Take time to list exactly which group discussions and activities you'll have at which point in the workshop. How much time will you allow for each exercise? Make sure your activities are appropriate for the size of the group, and ensure that your venue has the resources (for example, seminar rooms) needed to run sessions.

Remember, the more detailed your plan, the more you'll ensure that your workshop will run to schedule – and be successful.

Step 5: Develop a Follow-up Plan

The only way to find out if your workshop was a success is to have an effective follow-up plan. Create a questionnaire to give to all participants at the end of the event, and give them plenty of opportunity to share their opinions on how well it went. Although this can be a bit scary, it's the only way to learn – and improve – for the next time.

It's also important to have a plan to communicate the decisions that were reached during the workshop. Will you send out a mass email to everyone with the details? Will you put it on your company's intranet? People need to know that their hard work actually resulted in a decision or action, so keep them informed about what's happening after the workshop has ended.

During the Workshop – Getting People Involved

Once you have a solid advance plan, figure out how to bring some excitement into your event. You know the topics that you want to cover, but how will you make the information fun and memorable for your team?

Getting everyone involved is key to a successful workshop. If you stand up and talk for three hours, you're just giving a lecture – not facilitating a workshop. Everyone needs to participate.

Creating group exercises is different for each workshop. Keep these tips in mind:

- Many people are nervous about speaking up in an unfamiliar group. If you plan group exercises, keep the size of each group small, so people are more comfortable talking and interacting.

- Mix up different types of people in each group. For example, if several departments participate in your workshop, don't put members of the same department in their own group. By encouraging people to interact with other departments, they can learn to look at things from different perspectives.
- Determine how you'll record the ideas from each group. Will participants shout them out while you write them down? Or will they write down their own ideas and then give them to you? This is a small, but important, detail that's often overlooked.
- If you have five or fewer groups, spend time allowing the entire team to evaluate the ideas from each smaller group. This is a great way to narrow down your list of ideas, and let the good ones really shine.

Remember, spend as much time as you can creating fun and interesting group exercises. These will likely keep everyone interested and participating.

Overall Workshop Tips

Here are some more ideas for running a successful workshop:

- If you plan the meeting, you may want to facilitate it as well. Learn how to do this effectively in [The Role of a Facilitator](#) ⁺ .
- Start the meeting with a few [icebreakers](#) ⁺ to get everyone relaxed and comfortable.
- If your workshop's goal is to address a difficult or sensitive topic, it's especially important to get the group comfortable before starting. One way is to tell a story that's loosely related to the topic before you begin discussing the difficult issue.
- Sometimes, not everyone has to stay for the entire workshop. For instance, the CEO might be too busy to attend the whole session. Identify which sections your busiest participants need to attend, and suggest in advance when they might want to arrive and leave. They'll appreciate your consideration.
- Where possible, avoid holding your workshop after lunch, between 2:00 and 3:00 in the afternoon. For many people, this is their slowest, most unproductive time of day. Your group will probably be more energetic if you schedule the event in the morning or late afternoon. (If you have to run the workshop in the early afternoon, make sure there's plenty of strong coffee available!)
- If your workshop's ultimate goal is to make a decision about something, the more people who attend, the less likely it is that you'll reach a decision. Here, try to keep the number of people attending to a minimum (for example, by issuing minutes after the event to people who are just interested.) It's also important to become familiar with the different strategies for team decision

making. See our article on [Organizing Team Decision Making](#) ⁺ to learn more.

Key Points

There's no doubt that planning a great workshop is a lot of work. But if you spend time thinking through the details, everyone will get full value from the event.

The workshop's goal should be at the center of all your planning. Creative exercises will get everyone relaxed and involved, and don't forget to follow up afterward: Although it can be scary to hear what people really thought of all your hard work, it's the only way you'll improve your next event.

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