

VIRTUAL WORKSHOPS

THE HOW TO GUIDE



PRIVATE AND CONFIDENTIAL

A SIMPLE GUIDE TO RUNNING **VIRTUAL WORKSHOPS**



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VIRTUAL WORKSHOPS

6 OVERARCHING PRINCIPLES



It's not as easy as transferring what you do in an in-person workshop to online – different circumstances require different approaches, different roles & different rules

#1 OVER-PREPARE

Prepare, prepare & over-prepare – things are even more constrained in remote workshops, so advanced planning, check-ins and trial runs (plural!) are essential

#2 OVER-FACILITATE

Engage early and often – have a team of facilitators with distinct roles & have a plan to keep energy up

#3 OVER-COMMUNICATE

Over-communicate before, during & after – if it feels repetitive, you're doing it right. Use verbal, visual & auditory comms & consider how you **frame key points**

#4 USE TIME AS AN ASSET

Maximise your time together and use it wisely - overestimate everything, use pre & post-tasks, and break it down: 2 shorter sessions are better than 1 long one

#5 KNOW & MOTIVATE YOUR AUDIENCE

Understand your audience – how they like to work, what motivates them & their capabilities – and **set clear goals** to ensure everyone knows what you're working towards

#6 ROLL WITH THE PUNCHES

Expect the unexpected and be flexible – a key mantra for both the facilitator(s) and the participants. Things will go wrong, so have a Plan A, Plan B, Plan C and run with it

BEFORE THE WORKSHOP

6 KEY CONSIDERATIONS



At live sessions you have breaks and social activities. Online, it's all replaced by work. That's more exhausting mentally

Eric Morrow,
Design Facilitator at IBM

#1 PLAN, PLAN, PLAN SOME MORE

It's all in the planning - allow for more time to plan the workshop as well as ensuring you've invited the right people, at the right time

#2 HERO YOUR AGENDA

Managing expectations and **being clear** on what needs to be achieved at each point is essential to success. It is also key to helping **frame and anchor** the session

#3 MAKE SURE TECH HELPS VS HINDERS

Understand the team's tech capabilities and comfort and cater accordingly. Make sure to do **run throughs** and try to limit & simplify the platforms you use

#4 BUILD YOUR TEAM WITH CARE

Assign roles and responsibilities for each internal / facilitation team member, including the additional tech roles (e.g. time keeper, tech support and note keeper)

#5 USE PRE-WORK TO GET AHEAD

Before the session, make sure to share any **key information**, set up & **test the tech**, as well as **align on contingency plans** to help trouble shoot if needed

DURING THE WORKSHOP

7 KEY CONSIDERATIONS

“

If one person is not in the room, no one is in the room.

Dave Malouf, Designer and Founder of the IxDA

#1 START STRONG

Initiate engagement as soon as people join – have a welcome page, say hello, get them ‘in’ the session

#2 SET THE SCENE

Bring everyone onto the team – set expectations, set ground rules and ensure everyone participates in the warm-up exercise

#3 DIRECT TRAFFIC

Direct traffic throughout the session: call on people and nominate people to make it clear who should be speaking

#4 CHECK-IN, ALWAYS

Set up signals so you can easily check understanding (e.g. thumbs up). Remember to also check in with the internal team

#5 FUEL ENGAGEMENT

Have exercises and tools ready to **maintain energy & engagement**. You need to inject energy into the group!

#6 BE AGILE

You need to be ready to **adapt and flex in real time** – if tools aren’t working, if energy is low, if time is short: flex

#7 END ON A HIGH

You want people to leave feeling like it was **time well spent**. Collate **live feedback** and be clear on **next steps**

AFTER THE WORKSHOP

5 KEY CONSIDERATIONS



Once the workshop is done, take a deep breath – but the work isn't done yet. Making time to reflect, align and implement is key to continued success

#1 PROVIDE CLARITY ON NEXT STEPS

To maximise output and long-term impact, **ensure everyone is clear on next steps** and any relevant **roles / actions are assigned**

#2 LEVERAGE POST-TASKS

Use **take-home questions and/or exercises** to ensure learnings 'stick' and people 'own' the work – increasing likelihood of implementation / action

#3 FOLLOW-UP

Maintain communication post-workshop to keep momentum going & ensure learnings are captured, shared and aligned on

#4 SEEK FEEDBACK

Ask for feedback on **what worked well, areas to improve and suggestions** for next time – both from your team and participants

#5 REVIEW, RE-CHARGE, REPEAT!

Take stock of how things went, **iterate** based on feedback, and **get ready** for the next one!

THANK YOU!

Liz Thompson

Liz.Thompson@brandgenetics.com

+ 44 (0) 7575 923 398

Mia Christophers

Mia.Christophers@brandgenetics.com

+44 (0) 7766 130 515

Frankie O'Donohoe

Frances.Odonohoe@brandgenetics.com

+44 (0) 7834 355 127

Clemmie Prendergast

clemmie.prendergast@brandgenetics.com

+44 (0) 7887718552

