HOW TO RUN WORKSHOPS & EVENTS ONLINE

Playbook

May 2020

GATEONE

INTRODUCTION

EVERYTHING WE KNOW ABOUT THE WAY WE WORK IS CHANGING

ONLINE IS THE NEW NORMAL

Remote working has already become a reality and will be so for many more in the coming times – a form of accelerated/ enforced digital transformation.

Being effective in this environment is key, bearing in mind that there are a different set of skills and behaviours required to deliver interactions remotely versus face to face.

The good news is that a remote workshop conducted in a smart way can be as productive as one in person. Our aim is to show how.

WHAT'S IN THE PACK...

This playbook gives explanations, examples and templates of remote workshops' tools & methods.

GATEONE

WHAT'S DIFFERENT ABOUT RUNNING A WORKSHOP ONLINE VS. A WORKSHOP IN PHYSICAL PROXIMITY

UPSIDES, DOWNSIDES AND HOW TO FLIP THEM AROUND

Upsides:

- Online workshops are more inclusive and affordable.

- More flexible, you can spread the workshop out over time scheduling multiple sessions with time in between to prepare for the next wave.

- Environmentally sustainable and resulting in people spending less time away from family.

Downsides and how to flip them around:

- **A strong guiding hand is important.** Participants in virtual meetings are more likely to talk over one another, or to not speak at all. Call people to speak in turn.

- **Careful preparation is key.** Participants must have downloaded the right software, tested it and familiarised themselves with its operation. Materials, and the agenda, should also be prepared and circulated beforehand.

- **Verbal vs. Non-Verbal Communication.** Much of the nonverbal communication goes away in remote workshops. Ensure cameras are set-up properly. Emojis and GIFs in chats can help to convey emotion and clarify a message's meaning.

- **Breakout Group Activity.** Creating breakout groups online is less fluid than it is in person. It's important to practice how to reach a similar outcome leveraging video-conferencing platforms.

A digital-first mindset involves a new way of thinking about methods.

GATEONE

KEY ELEMENTS UNDERPINNING EFFECTIVE REMOTE WORKSHOPS

Purpose and context

Workshop teams

Tools

Design techniques

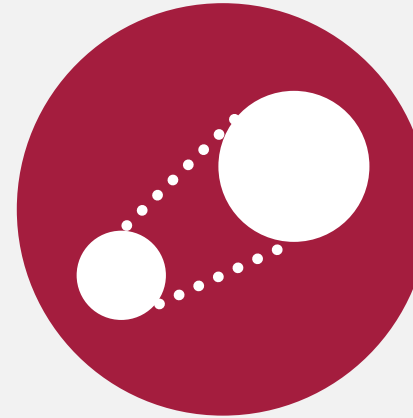- What we want to do and achieve.
- Understanding the needs, wants and issues of the participants.

- Teams have a shape, and we need to take that into account in our workshop strategy.

- Remote workshops rely on applications to make the interaction possible.

- Traditional facilitation techniques are replicable in an online environment. It's still key to choose the right ones, specific to the objectives of the workshop.

Effective Remote Workshops

GATEONE

PURPOSE AND CONTEXT

GATE ONE

PURPOSE AND CONTEXT

PURPOSE

Why do you want to run a WORKSHOP? *We need to be aware of it regardless of where we are meeting online or face to face…*

Sample **workshop types** are:
- Vision and strategic roadmap
- Digital disruption plan
- Target operating model design
- Risk management
  for complex transformation
- Leadership team alignment
- Customer experience mapping and
  Customer experience improvement
- New product design

CONTEXT

*The **most important** part of context is **understanding the needs, wants and issues of the participants**…*

- What do you need to know about/from them before proceeding?
- How will they benefit from participating? It can be easier to say no to a web meeting…
- What will motivate them to accept your invitation? How will you earn their attention and engagement?

Consider to send a survey in advance to gather background information and expectations from participants.
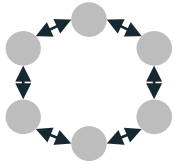
A clear purpose and context understanding determine a good online workshop design and ultimately the outcomes of it.

GATEONE

WORKSHOP TEAMS

GATEONE

TYPES OF REMOTE WORKSHOP TEAMS
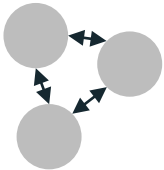
CONFIGURATIONS YOU CAN ENCOUNTER
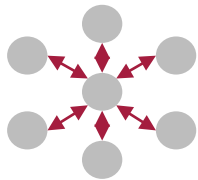
REMOTE TEAMS

Everyone 100% remote.
Each individual is working in a different location, separate from other employees. **This is the perfect configuration for remote collaboration.**

CO-LOCATED TEAMS

Two or more co-located teams collaborate between different locations. It usually happens when a company has office hubs in different locations. Team members in each office are used to collaborating remotely with those in another office. The problem is that often each office setting can create sub cultures.

HYBRID TEAMS

One co-located team collaborates with remote participants.
Usually a large HQ, with one-off team members and individuals working remotely. What frequently happens in these teams to the handful of remote people is that they are left out of strategy conversations happening in person at the HQ.

Each team shape corresponds to a different strategy. Facilitators must work to involve everyone.

The goal is to create a balanced interaction and psychological safety so everyone feels like they can contribute and feels engaged.

GATEONE

TOP TIPS

Ideal group size depends on the topic
Complex topics have a better chance of success with fewer participants. Straightforward topics involving fewer exercises still flow with larger groups.

Group size is a trade-off
Online workshops work well with 12, 16 or 24 people, because they provide the most flexibility when doing breakout sessions while including enough people to help the diversity of ideas and discussions.

Define the RACI
Responsible, Accountable, Consulted and Informed. Identify in advance who needs to participate in the workshop, who can just be informed of the outcomes afterwards.

Nail down the timing
The more people you include, the more time you'll need for introductions and sharing out. Build in time to think alone and come back to the whole group to share. Make time for breaks.

Pilot content
If you're running a workshop for the first time, consider doing a pilot with a smaller group.

Create an open and inspiring environment
The environment should be open and trusting to let participants feel free to express themselves and generate ideas. Kicking off with an icebreaker and using an informal tone helps to create a relaxed atmosphere.

Manage turn-taking
Turn-taking is more difficult in remote settings. Call on participants one at a time or ask them to use the chat to post their questions and take their turn in speaking.

Prepare breakout groups in advance
Give thought to dividing workshop participants into breakout groups or smaller teams ahead of time.

Don't let co-located groups dominate
Get everyone involved in the discussion. Leave space so everyone can feel encouraged to participate.
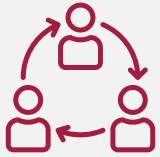
Go all remote
Level the playing field by having everyone participating remotely.

GATE ONE

TOOLS

GATEONE

KEY CAPABILITIES NEEDED FOR REMOTE WORKSHOPS

COMMUNICATE IN REAL-TIME

Two-way, real time communication, mirroring conventional workshops can be enabled by:
- **Video capability** (bandwidth permitting)
- **Voice capability**

Possible tools:
MS Teams
Zoom
Skype

ENGAGE AND INTERACT

Q&As, polls, surveys made available either ahead of a workshop or after the event has taken place.

Possible tools:
Pigeonhole Live
Mentimeter
Slido
MS Forms

SHARE CONTENT

Dedicated virtual workspace for participants to provide feedback, solve problems in their own time.

Possible tools:
SharePoint Folder
Teams Site – create specific channels per breakout group

THINK VISUALLY

Collaborate, brainstorm, prioritise, share ideas, concepts, artefacts and interact like you're in the same room.

Possible tools:
MS Whiteboard
Mural
Miro

STAY ORGANISED

Visualise planning and progress - assign tasks, visualise progress updates and any blockers, capture notes.

Possible tools:
MS Planner
MS Whiteboard

TOP TIPS

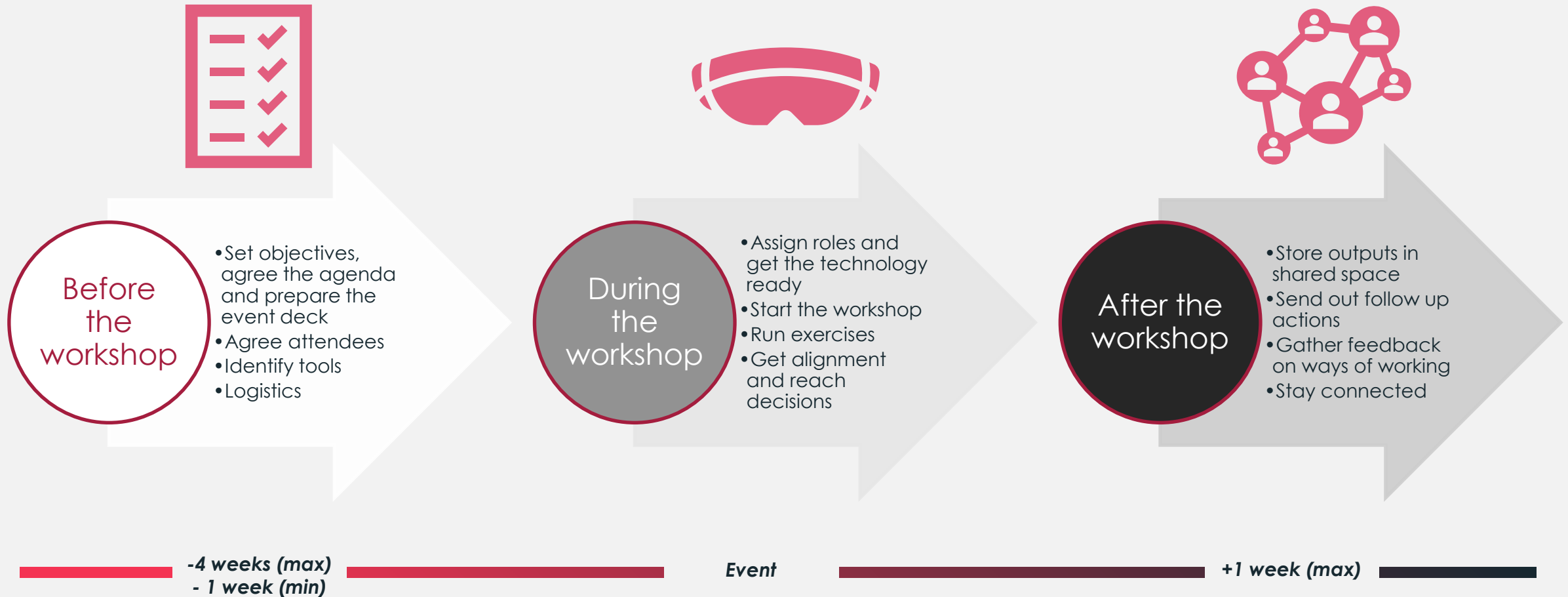**FAMILIARISE WITH THE TOOLS:**

Send a cheat sheet to participants on how to use the tools. Test the tools you are using with your teams.

Get the team used to moving fluidly between tools, from video conferencing to chats, whiteboards and back, for instance.

HAVE A PLAN B: technical issues are always a possibility. You should have a backup plan beforehand.

GATEONE

PLEASE SEE THE APPENDIX FOR DETAILS ON APPLICATIONS

WORKSHOP DESIGN TECHNIQUES

GATEONE

VIRTUAL WORKSHOP JOURNEY

Before the workshop
- Set objectives, agree the agenda and prepare the event deck
- Agree attendees
- Identify tools
- Logistics

During the workshop
- Assign roles and get the technology ready
- Start the workshop
- Run exercises
- Get alignment and reach decisions

After the workshop
- Store outputs in shared space
- Send out follow up actions
- Gather feedback on ways of working
- Stay connected

-4 weeks (max)
- 1 week (min)

Event

+1 week (max)

GATEONE

BEFORE THE VIRTUAL WORKSHOP

Before you set up a virtual workshop **STOP**

Do you need to have a workshop, or can it be done asynchronously in a virtual workspace?

If you do decide to facilitate a virtual workshop, then use the below tips and tricks during your preparation (good practice for face-to-face workshops still apply, but these are tips specific to virtual workshops)…

Before the workshop
- Set objectives, agree the agenda and prepare the event deck
- Agree attendees
- Identify tools
- Logistics

Set objectives, agree the agenda and prepare the event deck

- Prepare a detailed agenda and timebox the activities.
- Consider if some of the activities can be done individually or in small groups and only use time together when you really need co-creation or alignment.
- Structure your templates in advance in your chosen tool (as you would with a poster in a workshop).

Agree attendees

- Make sure you have the right people in the room who can contribute appropriately to the discussion topics – invite only those you cannot do without. (Use a RAPID to figure out who should be there)
- If it's your first virtual workshop, start small then grow over time as more people get used to the tool and ways of working.
- You can set up a group chat in advance (in MS Teams or other) to get people talking before the workshop.

Identify tools

- Test the tools you are using with your teams (look at the 'Tools' section of this playbook for a catalogue of virtual workshop tools).
- Send a cheat sheet to participants on how to use the tools (also offer individual training sessions on how to use the tools if needed – this might be a totally new concept to some people!) – and ask them to prepare a quiet space where they can work and check their technology works before they start.

Logistics

- If it's difficult to host all the activities in one day on a call, then consider splitting out the activities over the course of a week. You could also hold individual sessions with stakeholders if it's a small group then have a longer alignment session.
- Agree where the outputs for the workshop will be stored in advance and make sure everyone has access to this space.
- If people are in different time zones, consider the following: schedule multiple sessions; work asynchronously; avoid Mondays and Fridays.

GATEONE

DURING THE VIRTUAL WORKSHOP

Running a virtual workshop will require different facilitation skills to a face-to-face workshop. You'll need to think about how you can use online tools creatively to keep everyone on the call engaged, be stricter on timings and facilitate conversations where everyone has an opportunity to speak.

Conference Call Bingo

Hi, who just joined?	Can you e-mail that to everyone?	X? Are you there?	Uh, X, you're still sharing!	Guys, I have to jump to another call.
(Sound of someone typing... ...possibly with a hammer)	(Loud painful echo)	(Child noises)	Hi, can you hear me?	No, it's still loading.
Next slide please.	Can everyone go on mute, please?	Sorry, I was talking on mute.	Sorry, go ahead...	Sorry, my dog is really excited about this call.
So (fades out) I can (cuts out) by (unintelligible) ok?	Sorry, I am double booked.	X, your screen just greyed out.	Sorry, you cut out there.	Can we take this offline?
I'll have to get back to you on that.	Can everyone see my screen?	Sorry, I was having connection issues.	Sorry, I think there's a lag.	Sorry, the other call ran over.

During the workshop
- Assign roles and get the technology ready
- Start the workshop
- Run exercises
- Get alignment and reach decisions

Assign roles and get the technology ready

- Assign roles (if possible) and make sure you have someone focused on timekeeping and taking screenshots of the activities.
- Have all the apps you need open and ready and turn off any other distractions (set chat tools to do not disturb, snooze email).
- Have your detailed agenda also open on your screen (or printed) so you can keep track to timings.
- Replicate the environment of a physical workshop in your virtual space – use parking lots, put up workshop rules and the agenda.

Start the workshop

- Ask everyone to keep their cameras on, if possible, and ensure everyone contributes to the conversation.
- Recognise the different contexts people are in (time zones, location etc.).
- Be patient with people who are learning how to use the tool and give them time to adjust to the new ways of working.
- Use a warmup exercise to get people used to the tool if it's the first time they're using it.

Run exercises

- Give people lots of diverge and converge exercises where they need to think individually then read out their thoughts.
- You can ask people to speak one by one or ask people to nominate the next person to share their ideas (throw the virtual ball!).
- Have regular breaks in the agenda for people to step away from their laptops and a lunch break (if required) – you could even have a virtual lunch if you'd like to keep casual conversation going!

Get alignment and reach decisions

- Use votes and polls during the workshop to gauge how people are feeling and get alignment on decisions (e.g. using Pigeonhole Live or Mentimeter).
- Get different people on the call to summarise what's be done to date (on the Mural) and the discussions – keep everyone engaged and talking.

GATEONE

AFTER THE VIRTUAL WORKSHOP

Following the virtual workshop it'll be important to maintain momentum, ensure actions are completed and ensure everyone has access to the content as soon as possible (not dissimilar from when we run face-to-face workshops!).

After the workshop
- Store outputs in shared space
- Send out follow up actions
- Gather feedback on ways of working
- Stay connected

Share outputs in shared space
- If you don't have a shared space (Sharepoint or MS Teams) set up before the call, then make sure you set one up soon after the workshops finishes.
- Share the links/documents to any thing you've created soon after the call finishes – you can lock down/send as PDF any working documents so people can't edit them after the call.

Send out follow up actions
- If you've captured actions, then make sure you re-cap these at the end of the workshop and send them out shortly after it's finished.
- If you need to, set up a follow up call a week after the workshop has finished to follow up on any actions.

Gather feedback on ways of working
- Send out a feedback form for everyone to fill in on the workshop and particularly the remote working elements – we're not sure how long it will be like this and testing out new ways of working so we should continuously find ways to improve how we do remote working.
- Share your experience with others in Gate One on the tools you used, what worked well and what didn't work so well.

Stay connected
- Set up a Teams site (if you haven't already) to keep the conversation going and share ideas.
- If you're using tools like Mural or Whiteboard, you can also keep these spaces open for people to continue sharing ideas and collaborating.

RE-IMAGINE TRADITIONAL METHODS FOR ONLINE (1/2)

VIRTUAL WORKSHOP JOURNEY

Possible tools

BEFORE THE WORKSHOP

1 Workshop agenda
- To make remote workshops engaging, you must have a clear and well-paced structure available to participants.

- MS Planner
- MS Whiteboard
- Mural

2 Workshop dashboard
- Keep multiple parts of the workshop in one place, a virtual dashboard, so you and the team can see the big picture. Post all workshop output in that same common location.

- MS Whiteboard
- Mural
- Miro

3 Research - interviewing
- Successful designs are fed with continual investigation and research.

- MS Teams (videoconference, capture notes...)

DURING THE WORKSHOP

4 Onboarding
- Get your workshop participants engaged before the workshop. Share helpful information and get hands-on time with the tools in advance.

- MS Whiteboard
- Mural
- Miro

5 Warm-up exercises
- Have, for instance, everyone describe themselves with photos or create a poll/quiz and launch at the start of the workshop.

- MS Whiteboard
- Mural
- Miro

6 Brainstorming
- Get ideas. You can also have everyone brainstorm ideas in a pre-workshop. Working asynchronously - in advance - allows the team to use their time more efficiently.

- MS Whiteboard
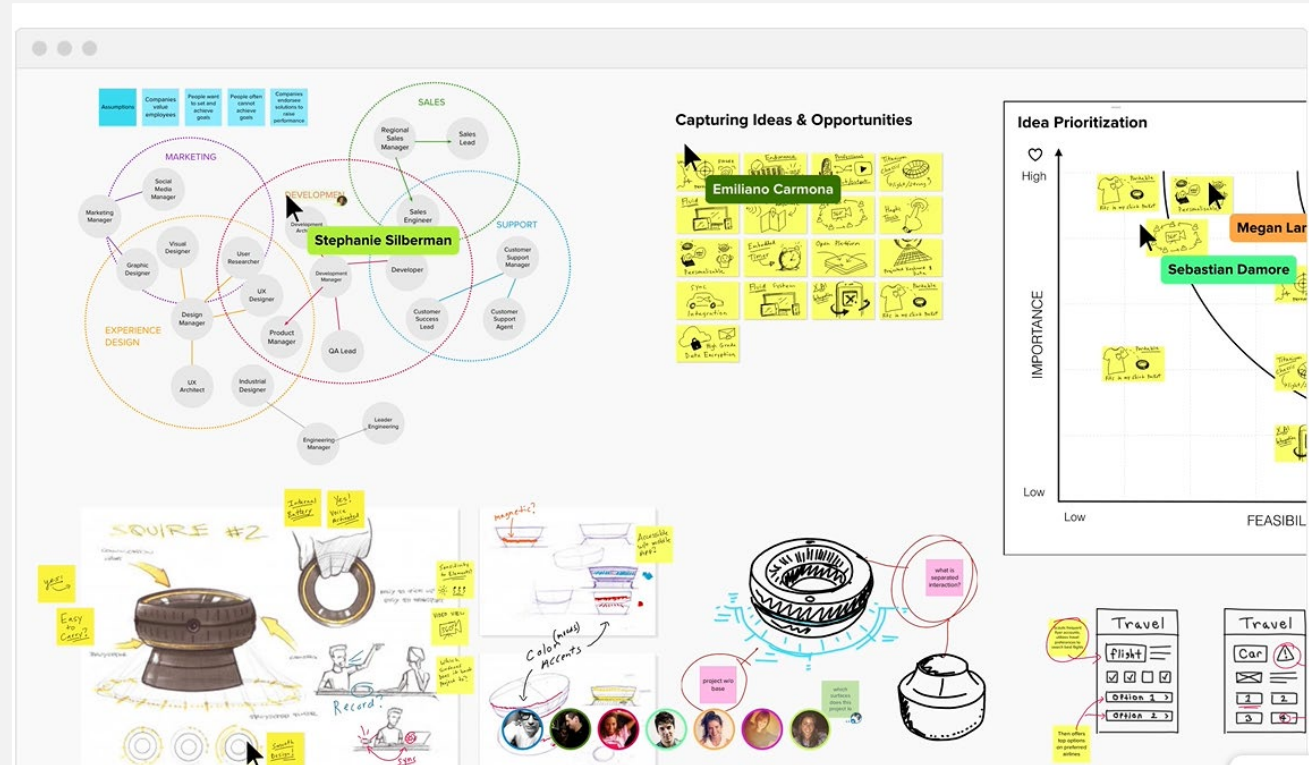- Mural
- Miro

GATEONE

RE-IMAGINE TRADITIONAL METHODS FOR ONLINE (2/2)

Possible tools

VIRTUAL WORKSHOP JOURNEY

DURING THE WORKSHOP

#			Possible tools
7	Break into groups	• Use breakout rooms to place people into groups to brainstorm or sketch out a concept.	• Zoom (recommended) • Ms Teams
8	Clustering	• The group will need to make sense of all the information and ideas they have gathered through research, or generated through brainstorming with a clustering method to find the dominant themes.	• MS Whiteboard • Mural • Miro
9	Voting	• Visualise the preferences among the participants in the workshop. Voting functionality speeds up the process and allows for additional rounds of voting.	• Pigeonhole Live • Mentimeter • Slido
10	Prioritising	• In order to decide which ideas will be taken forward, and which ones are left for another time you can use an Importance vs. complexity matrix, as you would do in a physical set-up.	• Importance/ complexity matrix (MURAL)
11	Creating and iterating	• Harness group creativity to quickly iterate and improve ideas.	• "Design studio template" in MURAL

GATEONE

#2 WORKSHOP WHITEBOARD
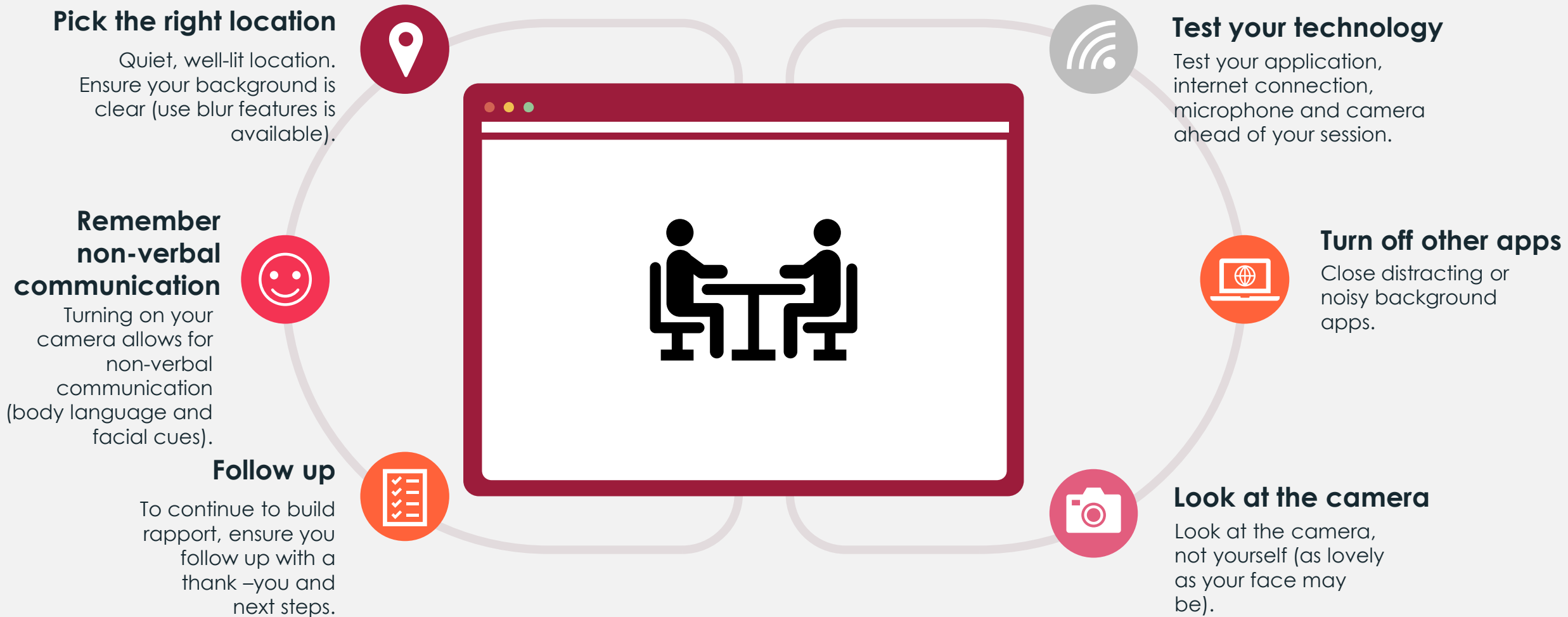
CLICK ON ANY OF THE LINKS BELOW TO FIND OUT MORE
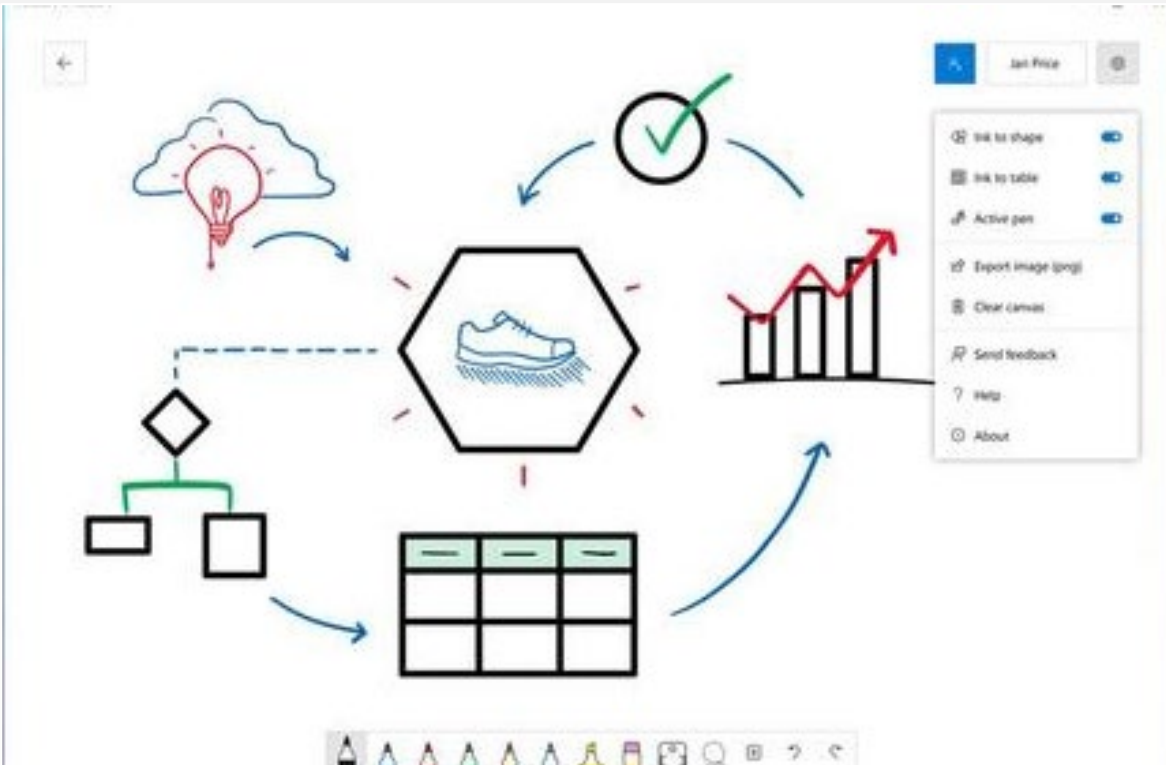
Microsoft Whiteboard

Mural

#3 INTERVIEWING METHODS

FEED YOUR DESIGN WITH INVESTIGATION AND RESEARCH

Pick the right location
Quiet, well-lit location. Ensure your background is clear (use blur features is available).

Test your technology
Test your application, internet connection, microphone and camera ahead of your session.

Remember non-verbal communication
Turning on your camera allows for non-verbal communication (body language and facial cues).

Turn off other apps
Close distracting or noisy background apps.

Follow up
To continue to build rapport, ensure you follow up with a thank –you and next steps.

Look at the camera
Look at the camera, not yourself (as lovely as your face may be).

GATEONE

#4-5 EXAMPLES OF ONBOARDING AND WARM-UP EXERCISES

GET PEOPLE TO LEARN SOMETHING NEW ABOUT EACH OTHER

Two truths and a lie

Via MS Teams - Ask participants to type each statement in the chat, and others to vote on the lie by giving a thumbs up.

Share a photo of…

Via a mobile/laptop camera - Ask participants to share a photo of their immediate environment, e.g. their desk, the view outside their window, favourite object on their desk.

What's your favourite…

Verbally - Ask participants to answer a couple of personal questions, e.g. favourite holiday destination, favourite film, favourite hobby, favourite musical instrument.

Competition

Via Pigeonhole Live/Slido - Create a poll/quiz ahead of the session and launch at the start of the workshop. Visualise responses. Questions could relate to the company/sector/ something more fun. Winner gets a small prize posted to their house.

GATEONE

22

#6, 8, 10, 11 BRAINSTORMING AND OTHER TOOLS SUPPORTING DIVERGENT AND CONVERGENT THINKING

FINDING PATTERNS, MURAL EXAMPLE, AFFINITY CLUSTERING

BRAINSTORMING, MURAL EXAMPLE, CREATIVE MATRIX

PRIORITISING, MURAL EXAMPLE, IMPORTANCE / DIFFICULTY MATRIX
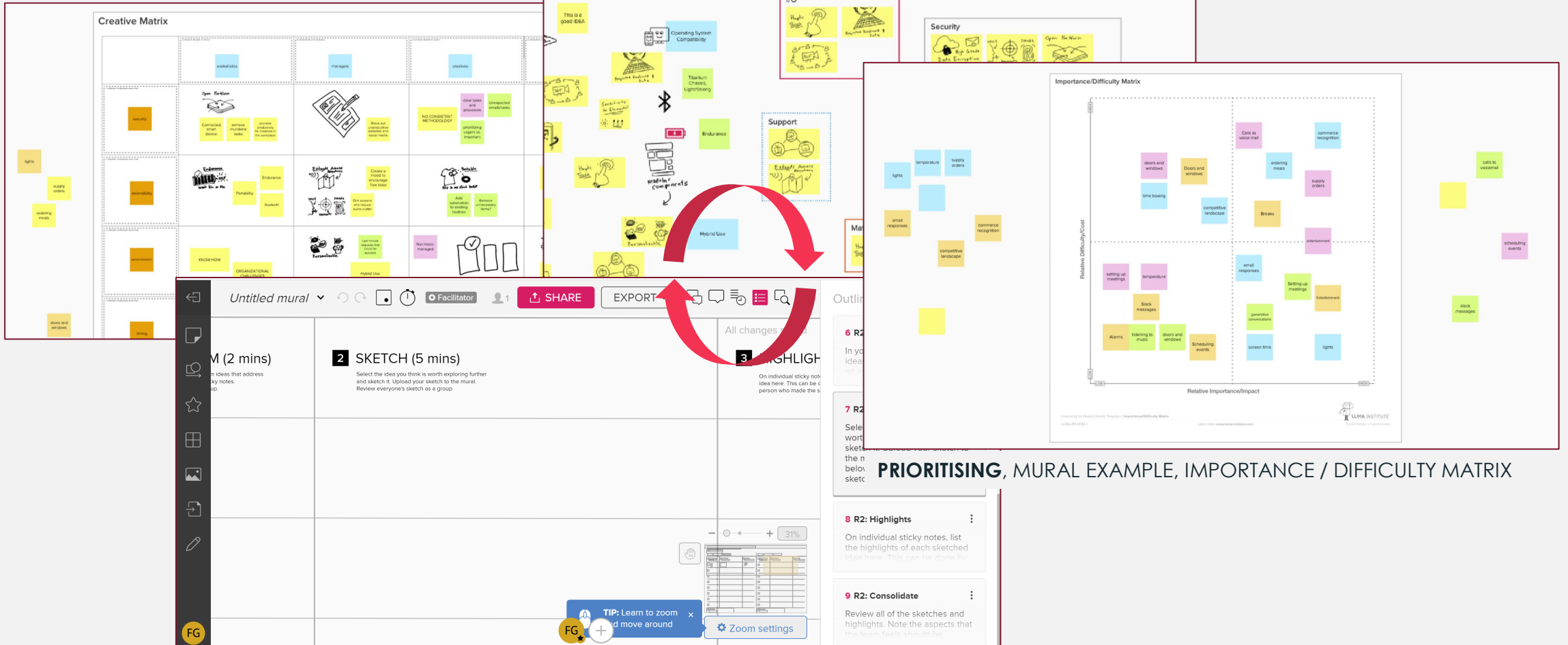
CREATING & ITERATING, MURAL EXAMPLE, "DESIGN STUDIO TEMPLATE"

GATE ONE

#7 HOW TO ENABLE WORKOUT GROUPS VIRTUALLY

USING MS TEAMS

Creating breakout groups on MS Teams will need to be done manually:

1. Create an overall meeting invite for your workshop, invite all participants.

2. Create separate meeting invites for your breakout sessions, inviting subset of overall participants to each.

3. Ensure each breakout group has a lead assigned ahead of the session who captures key points and plays back to the wider group.

4. Ask participants to leave main workshop meeting and join breakout meeting, later rejoining main workshop meeting invite.

USING ZOOM

Creating breakout rooms can be done by following the below:

1. Start an instant or scheduled meeting.

2. Click **breakout rooms**.

3. Select the number of rooms you would like to create, and how you would like to assign your participants to those rooms. Automatically, let Zoom split your participants up evenly into each of the rooms.
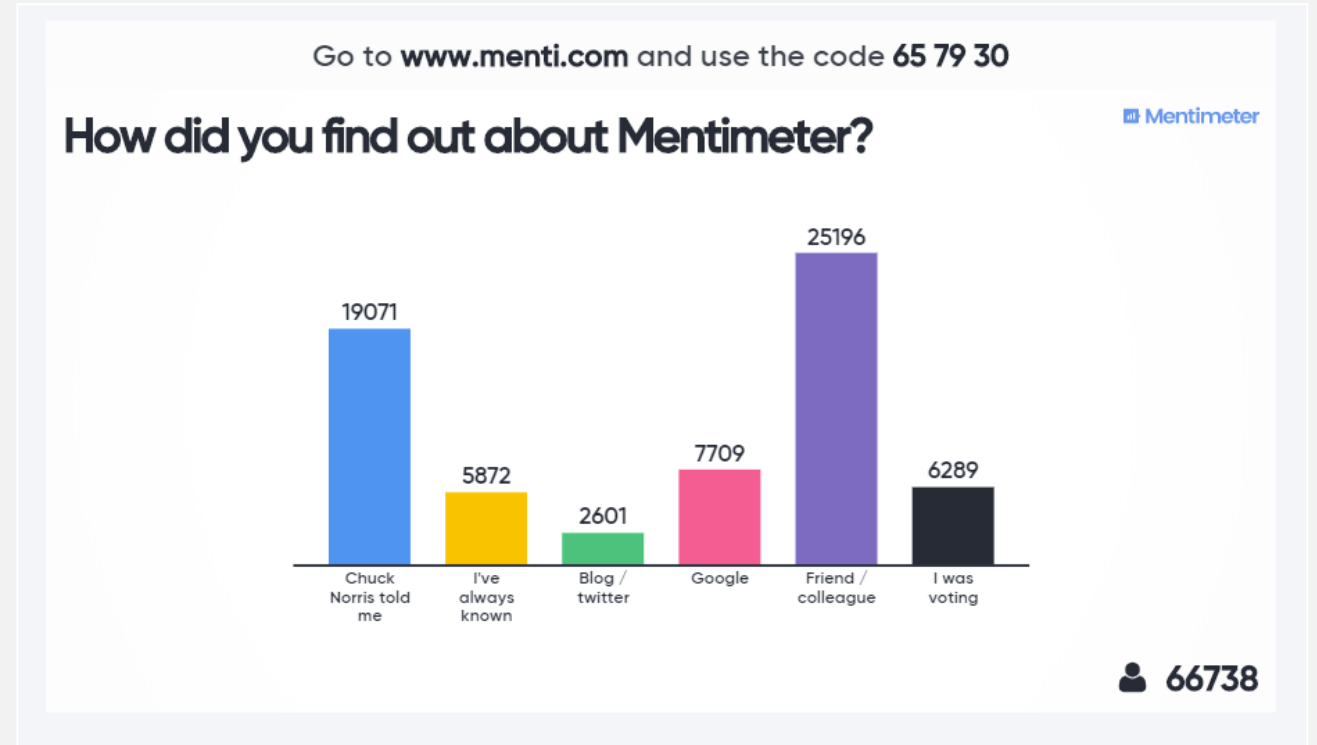
4. Click create rooms.

[Click here for a short tutorial video](#)

GATEONE

#9 SAMPLE OF LIVE POLLING AND Q&A

CLICK ON ANY OF THE LINKS BELOW TO FIND OUT MORE
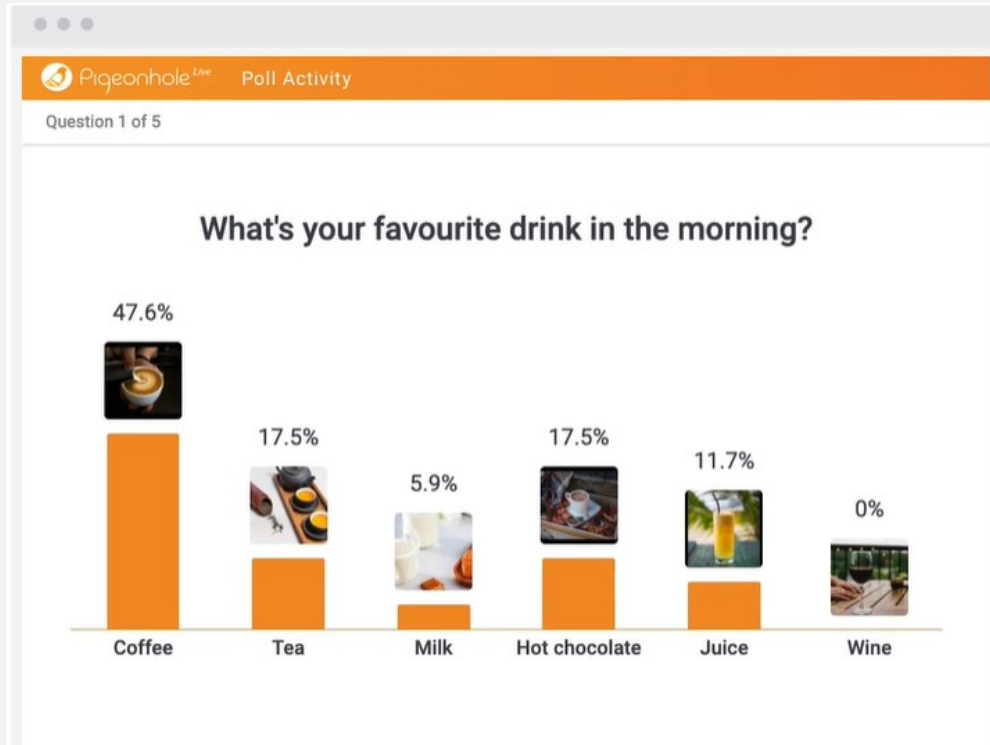
Pigeonhole Live

Mentimeter

Both platforms provide PowerPoint integrations to allow you to create interactive presentations for your workshops, check the links here: Pigeonhole & Mentimeter

GATEONE

ADDITIONAL GUIDANCE

GATEONE

USEFUL RELATED CONTENT

Click on any of the links below to access useful resources on each platform

MS Teams

- Help and support home page
- Video training
- Microsoft top tips
- Getting started – the basics
- Joining and managing a meeting
- Teams on the go
- Live events

MURAL

- Home page
- Intro video
- Remote facilitation guide
- Best practice templates
- Best practice framework
- Case studies
- Webinars
- Mobile apps
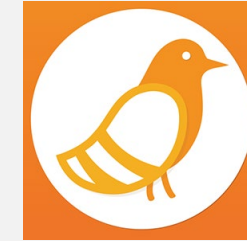
Pigeonhole Live

- Home page
- How it works
- Key features
- Video guides
- Help centre
- Blog
- Top tips to run online meeting

GATEONE