

# Facilitating a Successful Workshop

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PRACTICAL TOOLS TO MEET YOUR WORKSHOP OBJECTIVES

SEPTEMBER 2019

# About Me

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## **Victoria Perry**

Business Project Manager  
Investment Operations  
**Capital Group**



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# Agenda

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- Definition and Purpose
- Preparation
- Facilitation
- Group Exercise



# How about you?

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# Definition and Purpose

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A workshop is a **focused event** attended by key stakeholders and subject matter experts (SMEs) for a concentrated period of time.

A workshop may be held for different purposes including

- planning,
- analysis,
- design,
- scoping,
- requirements elicitation

A workshop may be used to **generate ideas** for new features or products, to **reach consensus** on a topic, or to **review** requirements or designs.

# Definition and Purpose

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Workshops generally include:

- a representative group of stakeholders,
- a defined goal,
- interactive and collaborative work,
- a defined work product, and
- a facilitator.

*Purpose:* Workshops bring stakeholders together in order to collaborate on achieving a predefined goal

# Your Role as Event Planner

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# Your Role as the Chief Learner

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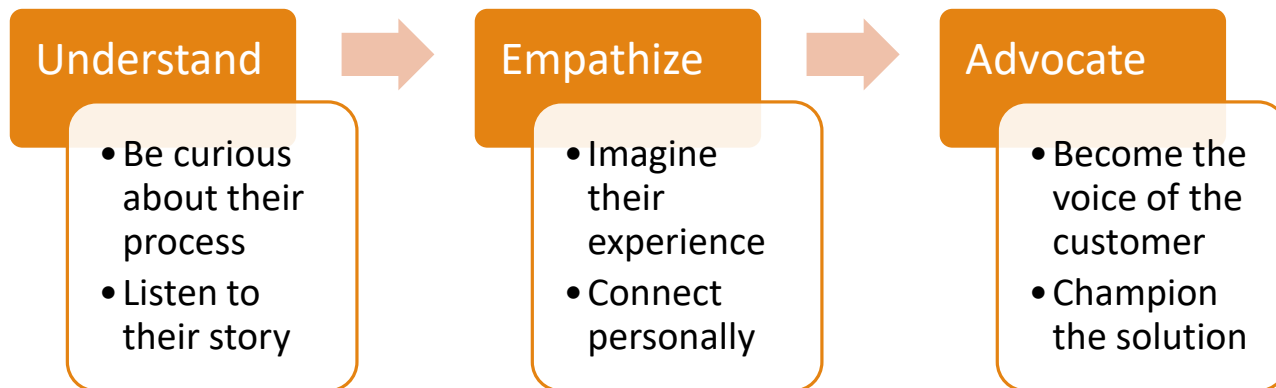
# Your Role as Paratrooper

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# Become Their Advocate

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# Preparation

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90% OF SUCCESS IS IN BEING PREPARED AND  
UNDERSTANDING YOUR AUDIENCE

# So where do I begin?

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**Who?**

**What?**

**Where?**

**When?**

**Why?**

**How?**

# Do you need a workshop?

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# Consider other methods

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**Interviews**  
BABOK 10.25



**Workshops**  
BABOK 10.50



**Observation**  
BABOK 10.31



**Survey or Questionnaire**  
BABOK 10.45

# So where do I begin?

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**Who?**

**What?**

**Where?**

**When?**

**Why?**

**How?**

# “Begin with the end in mind”

-Stephen Covey from *7 Habits*





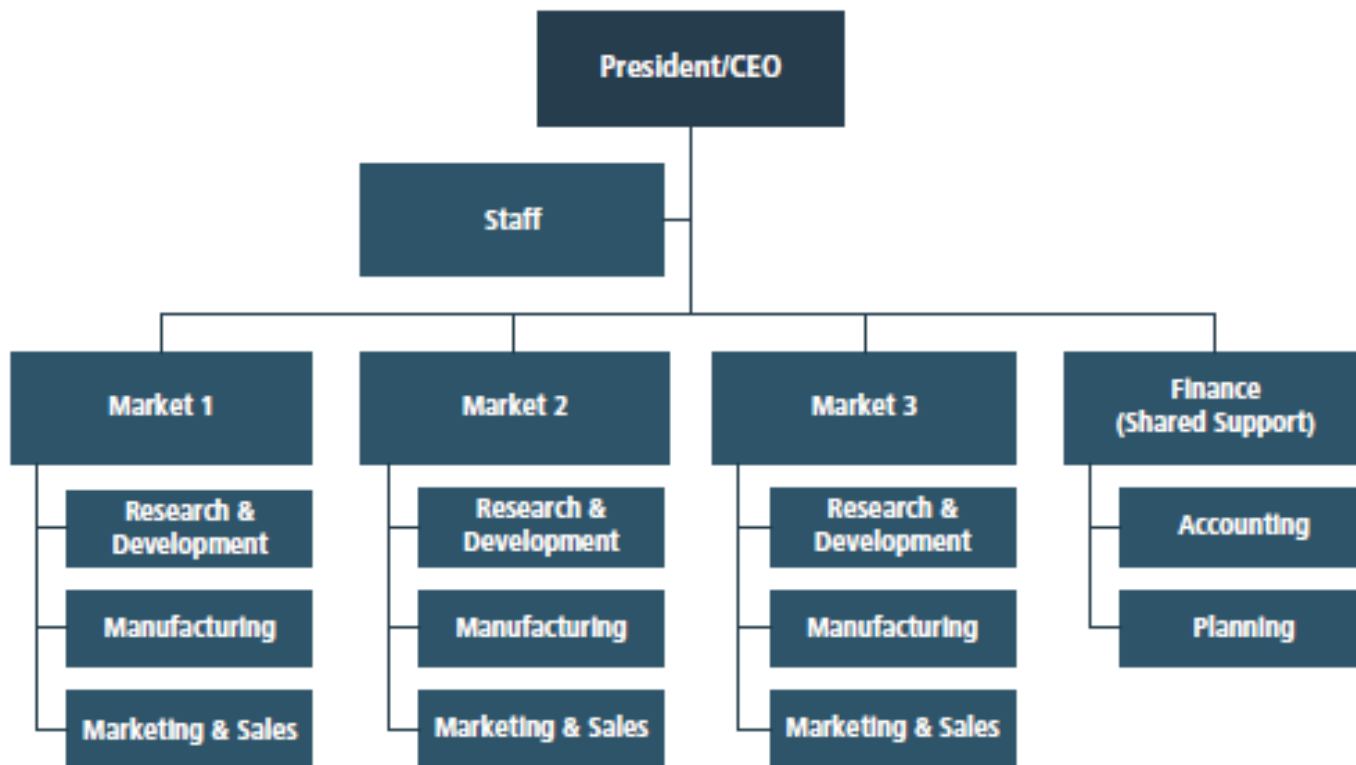
# SMART Goals

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- S** pecific
- M** easurable
- A** chievable
- R** elevant
- T** ime-bound

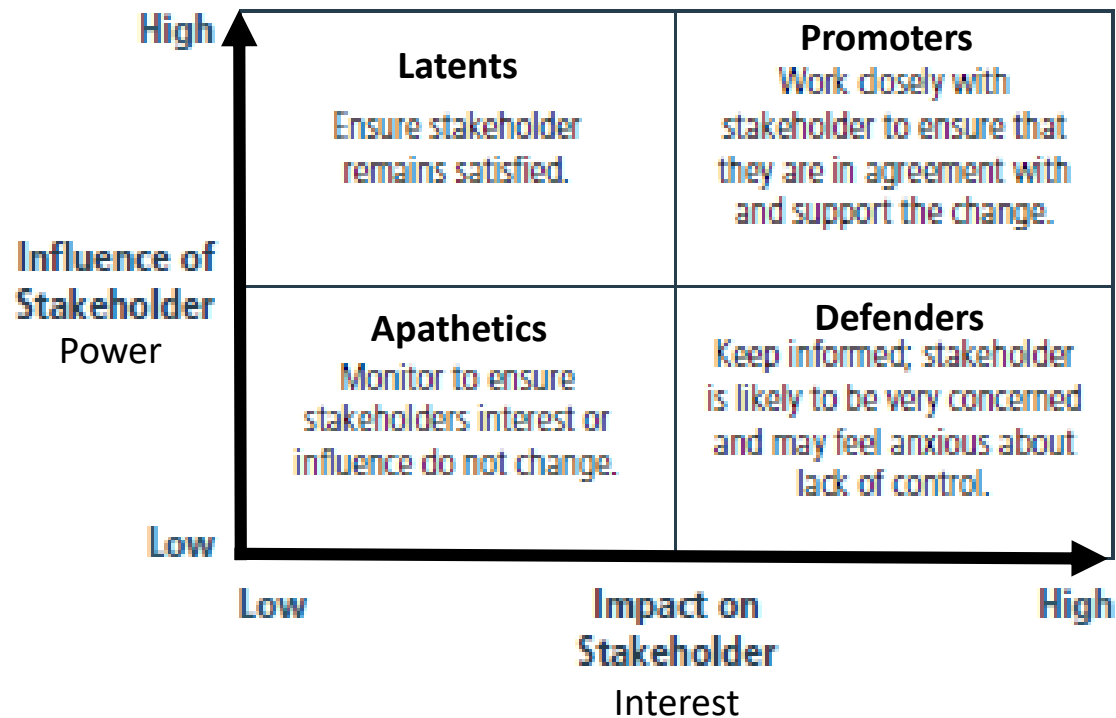
# Stakeholders

Figure 10.32.2: Market-oriented Organizational Model



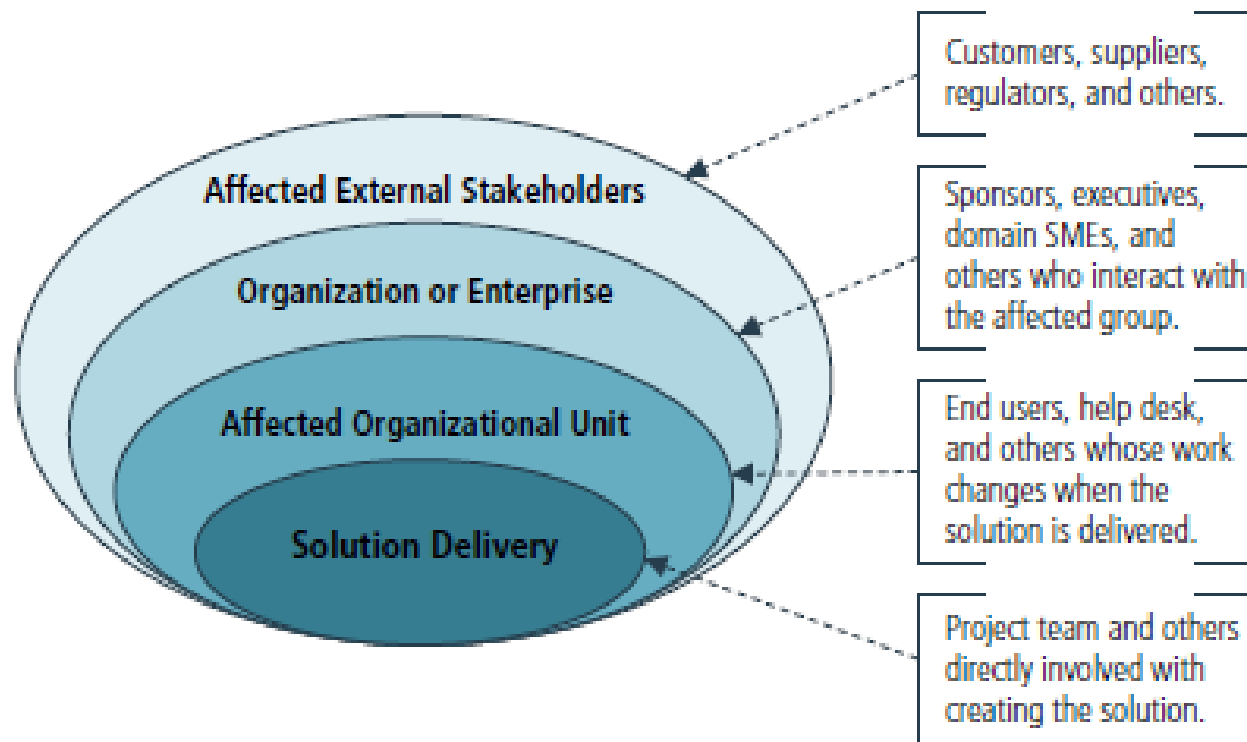
# Stakeholders

Figure 10.43.1: Stakeholder Matrix



# Stakeholders

Figure 10.43.2: Stakeholder Onion Diagram



# Stakeholders

## David Roberts

USER PERSONA

**AGE** 51  
**OCCUPATION** Director of Communications  
**STATUS** Married + 2 kids  
**LOCATION** DC  
**TIER** Senior level  
**ARCHETYPE** Professional

busy passionate overwhelmed



*"Knowing I am helping to make a positive difference in the world is more important to me than professional recognition"*

**MOTIVATIONS**

- Incentive**  
A newly created communications budget
- Achievement**  
To increase awareness of the non-profit
- Power**  
Open to explore unconventional comm. strategies

**GOALS** (The objectives this person hopes to achieve)

- To find a communications firm that can help get the momentum going about their non-profit
- To find a one-stop shop firm to streamline efforts he doesn't have the time to work with more than one firm.
- He's hoping to find a firm that shares the same values, to avoid political differences

**FRUSTRATIONS** (The pain points they'd like to avoid)

- He's not thrilled about the mudslinging going on in social media, but understands how important it is to be in the conversation.
- Everyone is in a hurry to get things going and he is inundated with media and other inquiries.

**BIO**  
 David was just brought on to lead the communications division of a non-profit that just received a large sum of donations thanks to a tweet by 45. His organization helps the disabled find jobs working remotely to help with the costs of the medical bills and they weren't well known until now. Communications has been sporadic and unorganized with no clear direction or goal. He needs help and needs it now.

**PERSONALITY**

Extrovert  Introvert

Sensing  Intuition

Thinking  Feeling

Judging  Perceiving

**TECHNOLOGY**

Internet

Software

Mobile Apps

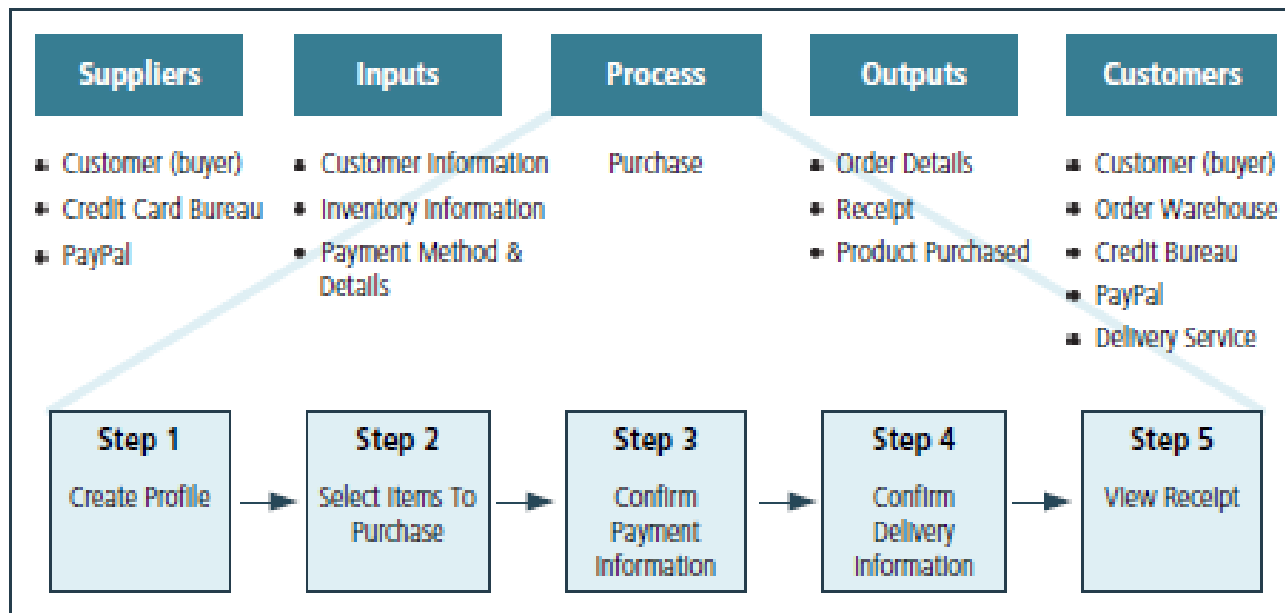
Social Networks

**DEVICES**



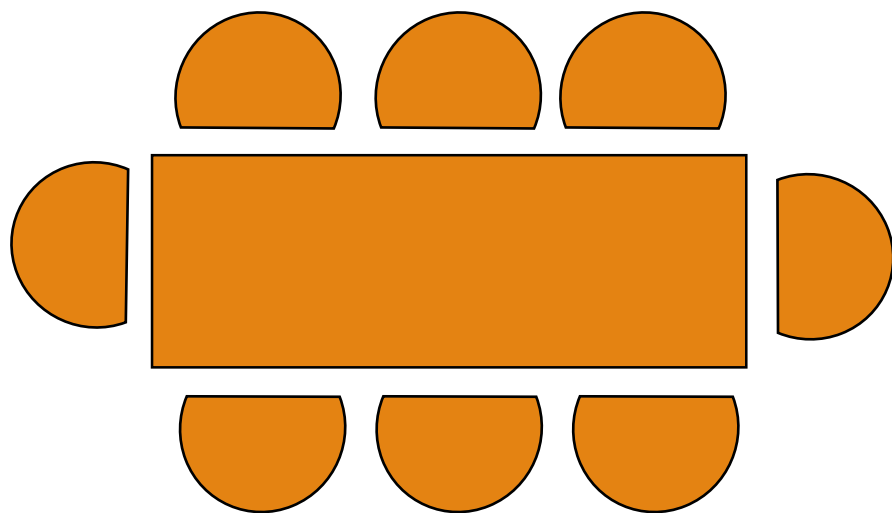
# Scope

Figure 10.34.1: SIPOC Model



# Setting

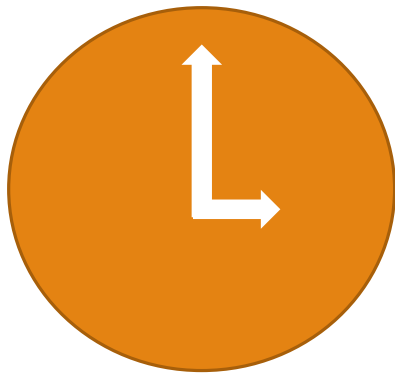
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# Schedule

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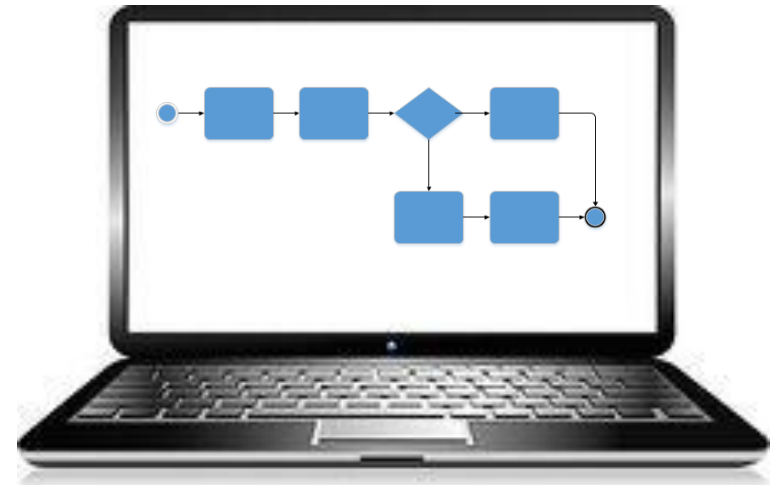
M	T	W	T	F





# Sticky Notes or Slides

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# My One Big Rule

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Do not start a meeting with a  
blank page  
  
(or a blank mind)

# My One Big Rule

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Have a Straw Man

Customer Request



# Facilitation

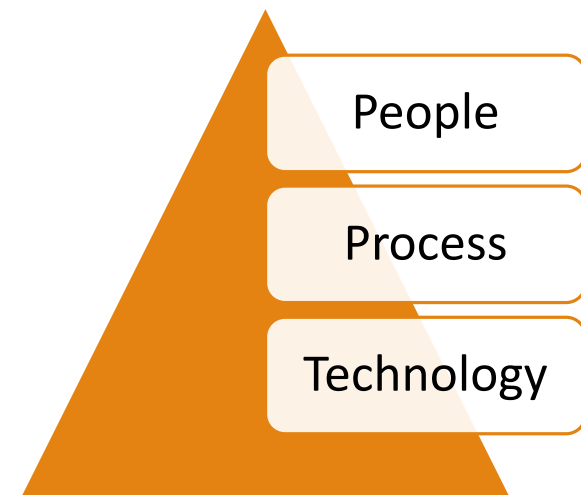
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ENGAGING STAKEHOLDERS AND PIVOTING

# State the Objective

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- Set the tone
- Outline the purpose of the workshop
- What you are seeking to accomplish
- Reiterate the success criteria



**Objective:** Impact Analysis

# Roles

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- Sponsor
- Facilitator
- Scribe
- Timekeeper
- Participants



# Facilitation Tips

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- You are the chief learner
  - Be curious
  - Ask “why?”
  - Learn together
  - Explore and experiment
  
- Encourage engagement
  - Watch for quiet observers
  - Ensure all participate
  - Look for power dynamics
  - Parking lot off topic items



# Standing





# Working Alone Together



# Working in Pods

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# Group Exercise

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PROTOTYPE THE TECHNIQUE

# Prototype

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1. How might we have a successful workshop?



# Prototype

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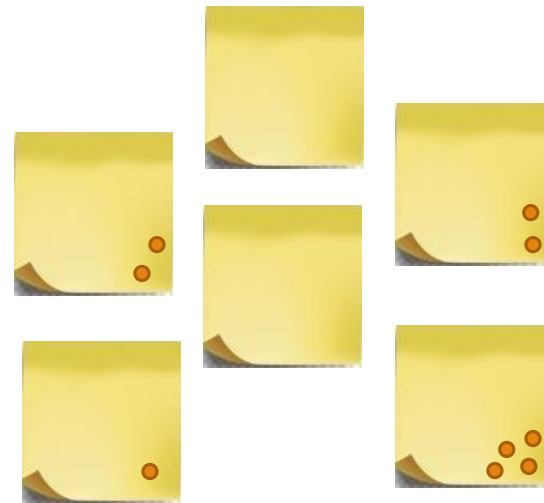
1. How might we have a successful workshop?
2. Group sticky notes into categories



# Prototype

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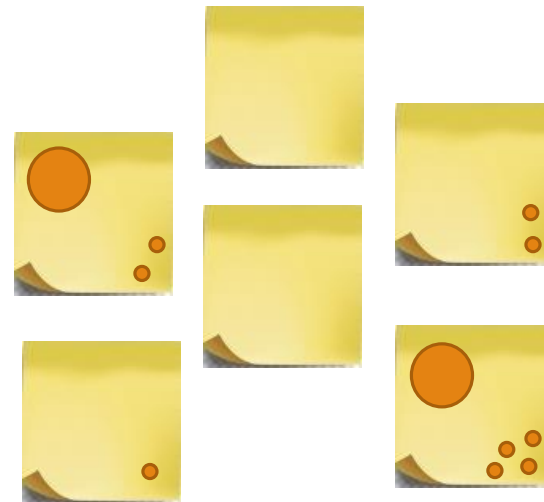
1. How might we have a successful workshop?
2. Group sticky notes into categories
3. Add some heat – what stands out?



# Prototype

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1. How might we have a successful workshop?
2. Group sticky notes into categories
3. Add some heat – what stands out?
4. Vote on the most important one



# Prototype

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1. How might we have a successful workshop?
2. Group sticky notes into categories
3. Add some heat – what stands out?
4. Vote on the most important one
5. Each pod shares highlights





# Closing

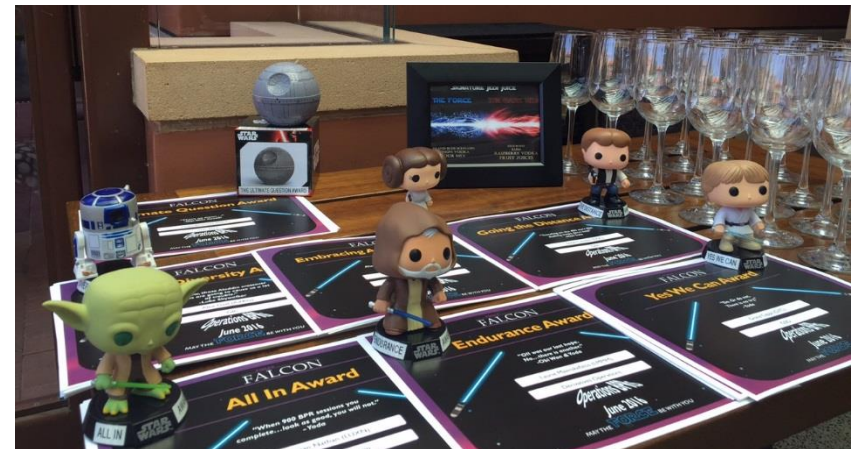
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IN SUMMARY

# Summary

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- Always have a clear objective.
- Preparation is key to a successful workshop.
- Understanding, empathizing, and advocating for your stakeholders is your primary objective.



# Summary

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- Never start a meeting with a blank sheet of paper – do your homework.
- As the chief learner, create an environment of exploration and experimentation.
- Each person adds value, so encourage engagement from each participant.



# Q&A

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Business Project Manager  
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# Facilitating a Successful Workshop

Understand

Empathize

Advocate

## Preparation

- **Who** Stakeholders
- **What** Scope
- **Where** Setting
- **When** Schedule
- **Why** SMART goals
- **How** Sticky notes or Slides

*Customize the event to reach your objectives and stakeholders*

## Key Takeaways

- Always have a clear objective.
- Never start a meeting with a blank sheet of paper – do your homework.
- As the chief learner, create an environment of exploration and experimentation.
- Each person adds value, so encourage engagement from each participant.

● Project Manager ● Business Analyst ● Event Planner ● Chief Learner ● Paratrooper ●

# How Might We (HMW) Exercise

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1. Create sticky notes
  - Prompt: How might we have a successful workshop?
2. Group sticky notes into categories
  - What themes are emerging?
3. Add some heat (little dots)
  - What resonates with you?
4. Vote (big dot)
  - What is the most important one to you?
5. Read out
  - What are the highlights of your findings?



# Presentation Overview

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So you need to facilitate a workshop to elicit information from the business, but where do you start? How do you plan a successful workshop? How do you identify who should attend and what format to use? How do you facilitate a group discussion and move the conversation forward? How do you document the responses from the participants and receive immediate feedback?

In this interactive session we'll discuss key characteristics to consider when planning a workshop. Victoria will share how she leverages tools like stakeholder analysis and the SIPOC to shape the discussion, and how to adapt the approach to the audience and location needs.

Whether you are an experienced professional or a novice, come prepared to share your questions and the lessons that you have learned over the years. We'll have table discussions to learn from each other, so your contribution will result in tangible takeaways for yourself and others.

# Bio

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Victoria Perry is a Business Project Manager at Capital Group. She works in Investment Operations where she partners with stakeholders across business and technology to solve critical business problems. Victoria enjoys challenging assumptions and advocates for innovative solutions that meet the true business need, increase associate engagement, and reduce waste and redundancies. She has facilitated dozens of workshops and worked on a breadth of projects from cross-team process improvements to a major multi-million dollar software implementation effort. She also serves on the leadership team for the Women's Initiative diversity community at Capital Group. Victoria is passionate about continuous learning having earned her PMP, a Business Analysis certificate from UCI, and an MBA at Concordia University.