



International Association of Facilitators  
**The Art and Mastery of Facilitation – Worlds of Change**  
Toronto, Ontario, Canada  
April 27 – 30, 2000



World of Professional Discipline

## STORYBOARD YOUR WORKSHOPS FOR TWO THUMBS UP

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### How It Works

1. After gathering and reviewing the appropriate background material and interviewing key participants, the facilitators list the issues and topics to be covered in the workshop.
2. The facilitators then decide the optimal order for covering those items.
3. An appropriate activity or exercise is identified and documented for each workshop item and for the beginning and ending of the workshop.

What we do	Why we do it
Determine how to make the participants comfortable and productive in the workshop	To increase the probability and degree of success for the workshop
Decide how best to tackle each issue and topic to be covered in the workshop	To increase the probability and degree of success for the workshop
Work out the flow of the workshop	To set and maintain an energetic but not frantic pace for the workshop activities
Confirm the logistics of the workshop	Confirm the logistics of the workshop



## **Designing the Workshop**

### Overview

The Workshop Design process is generally regarded as the most crucial component of the Workshop. The main objective of the Workshop Design is to provide a high-level road map of the approach the facilitators plan to use in addressing the client's issues and objectives. Custom designing workshops for each client ensures that the client's objectives will be met.

In addition to a client objective focus, the Workshop Design process also addresses any major issues the client may want to review. For example, the client's primary objective for holding the Workshop may be to define a Vision or a Business Plan. An underlying issue which may impact the client's ability to meet this objective is the lack of a cohesive management team. The design of the Visioning/Planning Workshop would also include activities focused on team building.

An objective of the workshop design should be to provide the clients with the opportunity to have fun during the Workshop. This contributes greatly to the overall success of a workshop and the client's overall sense of accomplishment.

In addition to the objectives stated above, the Workshop Design process is crucial because:

- customization of the design ensures that the workshop approach suits the client's business and not the other way around. Avoiding "canned" approaches transforms workshops from good to excellent delivery agents
- the collaboration of objectives and issues into the Workshop Design leads to better results, increased client satisfaction, and a more successful design of customized

workshops elicits more innovation and creativity on the part of the facilitators. This enhances the continuous learning and development in Workshop Design and Delivery

- a well designed workshop identifies the roles of the facilitators, builds their confidence, and strengthens the bond between them.
- time invested in the high-level design of the workshop reduces the preparation time required for the Detailed Agenda.

### Technique

It is strongly recommended that the Workshop Design process be performed in a team environment. This helps to stimulate the creative process, allows individuals to use each other as sounding-boards for ideas, concerns, etc. and builds a more cohesive facilitation team for the workshop. Also, seek the advice of other facilitators and business domain experts during the design. It is truly a collaborative process. The bottom line is that anyone who will be playing a part in the workshop, whether they are at the Apprentice, Journeyer or Master level, must be involved in the Workshop Design process.

The pre-workshop interviewing process feeds directly into the Workshop Design. For consistency purposes, the same people should be involved in both activities. Once the storyboard of the Workshop Design is completed, the design material is written up in the Orientation Guide. This process is what provides a large portion of the content for the Orientation Guide. It also feeds directly into the Detailed Agenda preparation process.

The first step in the Workshop Design process is to identify the detailed client objectives. These objectives will generally become explicit through the client interviews and must be validated with the client in order to confirm a common understanding.



The next step includes the identification of other issues which must be addressed during the Workshop. These issues may or may not have been expressed by the client. Often, they are observed by the facilitators during the interviews or pre-workshop planning process. The existence of any underlying issues will not necessarily be confirmed with the client. It is the responsibility of the facilitator, based on their expertise and experience, to recognize those behaviors which could potentially derail the workshop.

Once the objectives and issues are clearly understood, the next step is to "storyboard" the workshop. This involves dividing the workshop into a series of high-level frames or blocks of planned activities or exercises. One block will be designated for the beginning of the workshop and one for the ending. The middle of the storyboard will usually consist of a block for every objective to be addressed during the workshop. This type of storyboard allows the facilitators to test the flow of the entire session.

### The Beginning

This part of the workshop will usually be a presentation focused on providing context for the workshop. It focuses the participants and provides an opportunity to challenge, motivate and excite them. The facilitators also use this time to brief the participants on the logistics of the workshop (coffee, bathrooms, phones, break, end-times, etc.) as well as rules governing participant behavior during the workshop (e.g., silence is consent, the role of cross-talk, etc.)

This presentation will often be followed by a warm-up exercise. The aim of the exercise is to generate lots of interaction amongst the participants and to create a positive atmosphere for the remainder of the workshop. This exercise may be followed by a positive discussion centered around the business.

This optional discussion provides the participants with the opportunity to focus on recent accomplishments. It helps build synergy and promotes an open and safe workshop environment.

### The Middle

As stated earlier, the middle of the workshop is the segment devoted to client objectives. Each objective will be divided into a storyboard block. For each block, the facilitators will focus on what needs to be accomplished and what is the best way to go about accomplishing it. When addressing this part of the storyboard creation process, it is recommended that a series of questions be answered to help the facilitators set some parameters for designing or selecting exercises to include in the Workshop. These questions are:

- Will the participants conduct the exercise as a whole group or in break-out-groups?
- Is the exercise going to be based on a real situation or an imaginary one?
- Will the results of the exercise be used later in the process?
- Will the results be used to break a mold or to creatively energize the participants' ideas?
- Will the results of the exercise require personal opinion and observation or will group consensus be required?
- Will the exercise be based on creativity and intuition or on logical analysis?
- Will the group be asked to voice feelings or facts?

In order to be able to tackle the objectives and issues of the workshop, identify the appropriate questions to pose to the group and the manner in which they will be delivered. Will it be via a prescribed exercise, an open discussion, a scenario, or some combination of the above? Most of the Workshop Design effort will be concentrated on determining the best approach for handling the objectives and issues. Exercises are the most frequently used tool for moving the



group closer to attaining their objectives. Use the questions listed above to help build the exercises.

Once the facilitators have decided on the exercise or exercises to use within a block of the storyboard, the next step is to estimate the amount of time required for each exercise. As a rule of thumb, there are usually one to three exercises for each objective, with one exercise per objective being the norm. The time estimates made at this time will be included in the Detailed Agenda planning phase.

Included in this phase of the Workshop Design is the identification of any homework the group will be required to do in advance of the workshop, or overnight during the workshop. Identify at what point the homework results will be introduced; what exercise or discussion it will relate to. Identify what exercise or discussion the homework will relate to and at what point the homework will be introduced. These steps are repeated until all of the objectives of the workshop have been addressed.

### The End

This portion of the storyboard concentrates on concluding the workshop. This block should include a summary of what has been accomplished, what the next steps should be for the group in order to implement what they have agreed to in the workshop and a forum for the participants to evaluate the workshop (see the Workshop Evaluation section of this guide).

### **Designing an Exercise**

Here are some guidelines for designing exercises:

1. Be clear about the desired outcome of the exercise. Write out in one sentence what you want the participants to have achieved at the end of the exercise. Be sure to consider:
  - What information they should have produced

- What format the information should be in (do you need it written out? Voted on? Verbal, etc.)
- How they are feeling during and as a result of the exercise

2. Exercises tend to work well because a paradigm shift usually occurs when we change from what we "usually do" to something new. If for no other reason this is why simply putting the problem in front of them is not the most effective way of coming up with innovative, creative group answers. Generally speaking if a "status quo" answer is sufficient, a workshop may not be necessary. Design your exercises using as many of the senses as possible with as many dimensions as possible.

3. Never mislead or keep participants misinformed about the activity. All processes should be transparent so that individuals can build trust in you and in the group. This is especially important if you are going to ask the participants to share something personal.

4. The more intuition your exercise demands of the participants, the "truer" the results.

5. Warm up the players. Mental blocks (or brain cramps) are usually a result discomfort with the situation or pressure to produce the "right" answer. Work through a few exercises before tackling the "main issue" to get the creative juices flowing.

6. Soak, Shower, and Snooze. If you have introduced a new idea to the group, or if you are asking them to retrieve some information, let their subconscious do the work and be sure to give them time to let it sit, let them mull it over, give them a chance to check in with their feelings before you ask them for their opinion or their decision.

7. Have fun. Having fun indicates that a group is in harmony, a trust level exists and there is a relaxed nature about the session. Having fun in a safe environment usually



encourages participants to let go of their current constraints and politics and better engages them in the activity. If we think about it we admire most those who can do what they love. We admire the concert pianist who feels passion for his music, the sales representative who loves going to cocktail parties and meeting new people, the analyst who loves solving difficult problems, staying up all night to get it done. Why do we envy them? Because they are enjoying what they are doing. Workshops are often stressful; reduce the stress level of your participants by introducing some levity. (Please note that there is a difference between having fun and wasting time or being silly).







Successes and Pitfalls

The success or failure of any workshop is directly proportional to how well or how poorly the workshop was designed. The importance of this activity cannot be overstated.

Designing an Exercise with Storyboard -- Example

**High Level Story Board - What will happen**

**1st objective:** A Love Story **2nd objective:** encourage people to respect each other

<p><b>Intro</b></p>	 Intrc man	 Intro wcrman	 Fall in love
 cris.s	 lonelness		<p><b>Conclusion</b></p>

**Second Level - Phase Objectives - What is accomplished?**



Intro man

Objective: **Introduce male character**

1. Give pertinent information
2. Have audience love him
3. Create suspense

**Third Level - Exercises - How each is done**

Give pertinent information:

Open the scene with a shot on the man walking alone through the city park, He is walking with purpose and it would appear that he is headed to a meeting. He ....

**High Level Story Board - What will happen**

**1st objective:** Determine new service delivery structure.

**2nd objective:** Build open environment for communication

<b><i>INTRO</i></b>	<b><i>TRENDS</i></b>	<b><i>CLIENT NEEDS</i></b>	<b><i>CURRENT SERVICES</i></b>
<b><i>COMPARE</i></b>	<b><i>INVEST/ DIVEST</i></b>	<b><i>NEW STRUCTURE</i></b>	<b><i>CONCLUSION</i></b>

**Second Level - Phase Objectives - What is accomplished?**

Objective: **Identify Trends**

1. Look at industry over 50 years
2. Look at current Marketplace
3. Pinpoint trends affecting us



**Third Level - Exercises - *How each is done***

**Look at industry over 50 years:**

<ol style="list-style-type: none"> <li>1. Break out groups (BOGs) of 3</li> <li>2. Each group comes up with top 20 trends</li> <li>3. Regroup and plot on massive wall chart</li> <li>4. Discussion in the group</li> </ol>	<p><b>Needs:</b> paper for wall, markers, instructions, BOG space</p> <p><b>Outputs:</b> Visual capture of industry trends that can be referred to during session</p>
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**Facilitator Biography**

Tania Carrière -- Tania is experienced in the design and implementation of organizational renewal and transformation strategies. As Calian Management Consulting’s Facilitation Practice Development Leader, (a Calian core competency), Tania is responsible for keeping the Calian Management Consulting’s Facilitation practice abreast of advancing trends and international standards. She is co-author of Calian’s five-day facilitation course, *Facilitating Participation: A Coaching Program for Facilitators*. Her experience has included business transformation, organizational behaviour and change implementation management, communication strategy planning and strategic planning. She has been instrumental in the development of Calian’s Internet database the FacilitationFactory™.

This Material is a condensed version of the Learning Module "designing the Workshop" from Calian’s *Facilitating Participation* course. For More Information on Public or Private Offerings of this course, please contact the presenter.