

# Running Workshops Effectively

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Workshops may be a cause of pain when they are not run well. It may seem obvious what needs to be done but somehow workshops end up with an outcome that was not planned or expected.

Business analysts tend to spend a lot of time in a string of endless meetings and workshops. The BAs are constantly challenged to achieve more within a shorter time frame. As a result, good workshops are becoming a core competency for BAs to enable them to effectively achieve their objectives.

Whether you're new to workshops or have years of experience, this guide provides a good opportunity to enhance your skills and be successful in your day-to-day interaction with groups.

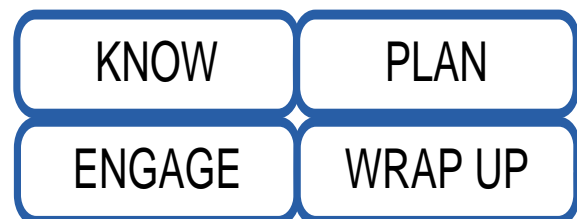
## Your role

Being in charge of workshop facilitation means that you have certain responsibilities. These responsibilities can be summarized in the following way:

- Guide the group to attain the specified goals or outcomes
- Initiate and support collaboration during the workshop
- Engage all participants and recognize their contribution during the workshop.

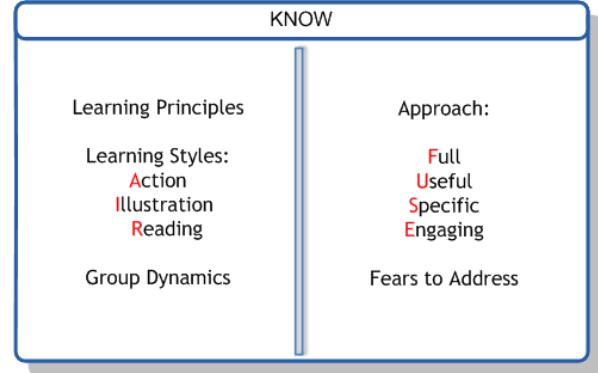
## Four boxes

Each workshop can be thought of as a set of four boxes. Their names are KNOW, PLAN, ENGAGE and WRAP UP. Each box includes a number of activities that you have to run through to ensure that you are well prepared and know what to expect at any point during the actual workshop. Let's open each box and explore what is inside.



## KNOW

Before you start planning your workshop, take some time to think about the ways people learn. No two people are the same. Each of us has a preferred way of learning and these ways need to be taken into account when you are planning the workshop.



### Learning principles

There are three major learning styles. Some people will strongly prefer one style, while others will employ a combination of them to learn.

I call the first style *Action*. People with this style get new information and learn from taking an action. These people need to try the new information to verify it.

The second style is *Illustration*. You probably noticed many times that pictures speed up the comprehension process for many people. People with this style rely on illustrations to grasp the whole idea and then work on details.

**TIP: To memorise these styles you can use an abbreviation AIR.**

The last style is *Reading*. Some people can get the new idea only after reading the explanatory paper or a book.

What's the value in being aware of these styles? They help you define how the content of the workshop should be presented. These styles also help you to understand your audience and their preferences better.

### Group dynamics

Working on projects is quite challenging as business analysts deal with multiple people. These people can be members of stable groups (e.g. departments) and at the same time members of temporary teams working on projects. In order to deal with temporary teams better, you need to understand the group lifecycle.

A team typically passes through several stages during the project. These stages are:

- Forming

Members of the team meet for the first time during this stage. It is important for the members to get involved with each other. The team leader (usually a project manager) provides clear and strong guidance to ensure the group members feel comfort and clarity of goals.

- Storming

Team members start to express their individual differences, join with others who share the same beliefs and values, and compete for a higher position in the team. The team leader encourages the members to outline their views to achieve consensus within the group.

- Norming

Team members begin to share the team's overall goals. The team leader focuses on specifying clear team structure, the roles and responsibilities of each member, and processes to follow to achieve the planned goals.

- Performing

The team members collaboratively work toward achieving the goals. During this stage, the team leader fades into background somewhat in order to encourage stronger participation and involvement amongst the team. Knowledge sharing and openness both become a norm within the team.

- Closing

This is the stage where the team has achieved its goals. Here it is important to recognize the contribution of each member to the team's success and ensure that members return to their stable teams with a positive attitude.

You need to understand these stages to ensure that you go through the first three stages quickly, especially when you run the first workshop with a particular team. The second and following workshops will go easier if you continue to work with the same team.

In addition to the described team lifecycle, you need to be aware of other factors affecting the workshop. These are:

- Level of participation (Who is leading? who is just following?)
- Interaction (Who talks to whom? who is silent?)
- Influence (Who suppresses others? why?)
- Atmosphere (Is it friendly and open? Is it hostile?)
- Collaboration (Who supports the discussion? Is it low or high?)

## Approach

Now, let's talk about the approach you need to take. Over the years of practice I have come to a simple approach that can be called *FUSE*.

It means that I draw the **Full** picture of what the workshop will cover from the outset. It is like giving a map to those who wants to get from A to B but don't know which path to take to keep it short.

I design the workshop in such a way that the obtained knowledge and ideas are **Useful** to the participants.

*TIP: To memorise these steps you can use an abbreviation FUSE.*

The topics must be **Specific** and relevant to their interests.

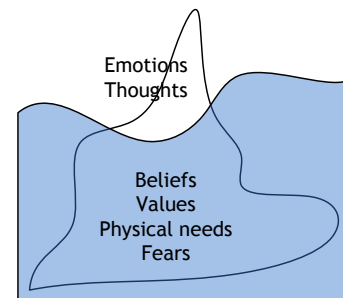
The way in which knowledge is obtained and shared must be **Engaging** to support open collaboration and a desire to contribute to the workshop.

## Fears to address

I challenge you to think about people as if they were icebergs. We see just a tip of the iceberg and quite often are not fully aware of what is hidden below the surface. But exactly the hidden area drives behavior of the tip.

So, what factors you shall take into account? Here is the list:

- Emotions
- Thoughts
- Beliefs
- Values
- Physical needs
- Fears.



The last five factors define the behavior of participants, guide their thinking process and expression of emotions. By accommodating these five factors you will create a positive atmosphere in the workshop and tune people to collaboration.

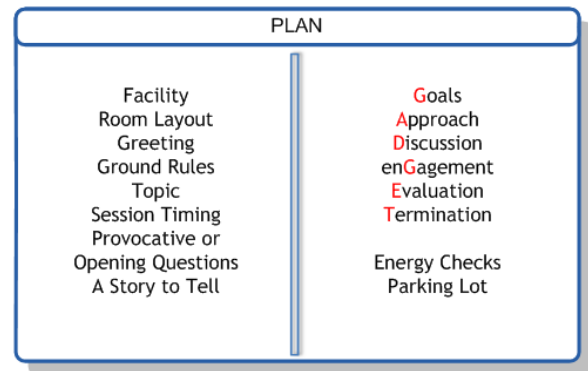
## PLAN

### Facility

The planning box is a foundation for a good workshop. You need to consider a place where the workshop will be held to ensure that each participant can easily find it.

### Room layout

The room layout should not be ignored. It may destroy collaborative spirit you were about to build during the workshop. Think about desks and chairs and how to arrange them in the room to create a productive environment.



### Greeting

Think of a greeting that will put everyone at ease from the beginning. Use the greeting to switch people to the upcoming discussion and encourage them to leave their “baggage” (concerns) outside the room.

### Ground rules

Design ground rules that will help you to maintain order and planned flow of the workshop. If you have rules, it’ll be easy for you to refer to them when you need to get the conversation back on track.

### Topic

Determine a topic and how it will be presented to the audience. Don’t use long sentences to describe what you are after. Keep it short and simple.

### Session timing

Consider the timing of the workshop. Try it with an assistant; make notes where you may require a buffer to cover unexpected lengthy discussions. Write a time schedule of the workshop with all the necessary notes to help you stick to the plan.

### Workshop opening

I’ve mentioned the “baggage” to be left outside the room. To help the participants to switch into the right gear for the workshop, think over possible opening questions that may be of provocative nature. Such questions attract more attention due to natural curiosity of humans.

For greenfield projects it may be useful to prepare a story that conveys the core idea of the upcoming topic or metaphorically delivers a background of why the workshop is held.

### Useful tool

To simplify all these preparations, I suggest using a structured approach to planning the workshop.

- Clearly establish **Goals** to be achieved,
- Define the **Approach** you will take to run the workshop,
- Determine how you will guide the **Discussion**,
- **EnGage** participants during the workshop,
- Plan how you will **Evaluate** the workshop's outcomes,
- Determine ways to **Terminate** discussions on the planned topics.

*TIP: To memorise these steps you can use an abbreviation **GADGET**.*

### Energy checks

When you are planning to run the workshop for longer than 45 minutes, consider breaks and some activity to “recharge” the activity of the participants. Breaks are required to address physical needs of the participants and attend to urgent business calls if required.

Allocate the time required for breaks and activities into the schedule.

### Parking lot

It is completely normal that certain questions will not be answered straight away at the workshop. The best way to stick to your schedule is to put these questions into the “parking lot”.

The main idea behind the parking lot is to collect questions that require additional actions to satisfy them. The parking lot also shows the participants that every question is noted and their contribution is valued rather than just discarded as irrelevant to the topic.