

Contribute to  
future versions of  
this guide.  
Get in touch.

# A Guide to Facilitating Workshops Remotely

---

Brought to you by the Human-Centred Design team  
at Connected Places Catapult

By Liam Dargan, Martin Pett and Jamie Chan-Pensley  
External Version 1.0 Spring 2020

**CATAPULT**  
Connected Places

## Introduction

---

We've collated the best recommendations from around the web and our colleagues at Connected Places Catapult to create this quick guide to help you get the most out of remote workshops that you may be running. It includes tips and tricks to consider:

- When preparing your workshop
- During your workshop
- After the workshop is complete

### **What do we mean by 'workshops'?**

*A group of people coming together (physically or virtually) to share ideas and insights around a particular subject matter. Compared to a seminar or conference, a workshop usually involves active participation from some or all those taking part.*

---

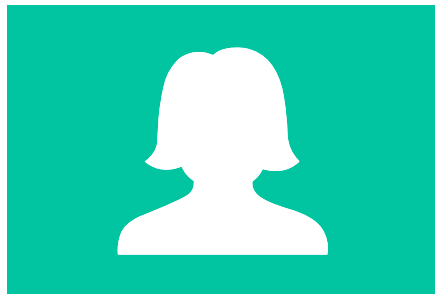
The Human-Centred Design team is made up of the Human Factors & Research team, The Insight & Service Design team and the Creative Studio team.

If you'd like to contribute to future versions of this document, or if you'd like to hear more about our services and workshop support, [get in touch](#).

# Preparing for your workshop

## 1. Consider your approach

Do you need a workshop? What is the purpose of your workshop? What do you hope to get out of your participants? Thinking about this will help you to choose the method of delivery below. It's worth noting that the more active the workshop is for participants, the more complex they can be to run for you, the facilitator – *but* they will also be more valuable. You can also choose a combination of methods.



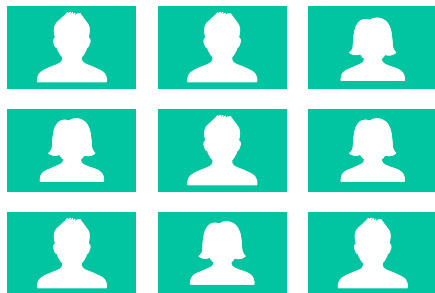
### Webinar (not a workshop)

An audience listens to selected speakers and can interact through Q&As or polls



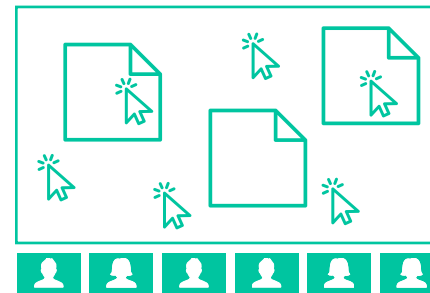
### Limited participation

Audiences contribute but only facilitators edit the collaborative software and share their screen



### Group Video Call

A group of people come together and talk



### Active participation for all

All participants can edit the collaborative software at the same time.

# Preparing for your workshop

## 2. Choose your platforms & tools, become familiar with them and make sure they're secure.

Make sure to decide on your workshop tools beforehand. Give yourself two–three hours a couple of days before to get to know them. Practice with colleagues and create templates and examples to make it easier for participants to pick up.

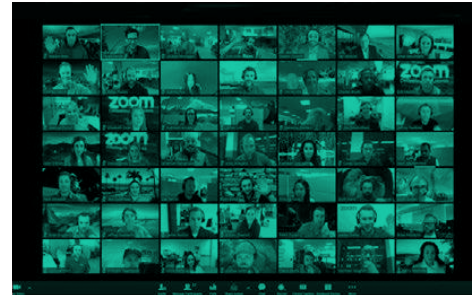
Where possible, choose tools that your participants might already be familiar with. Consider manual tools too! For example, you could create paper templates that people can print, draw on, take a photo of and send back.

Don't forget the basics. Remember to:

- Review and customise the [security settings](#)
- Test your audio, video and internet quality
- Let your participants know in advance if they need to download any tools or software

See [this detailed list of tools that you might want to consider](#)

### Example platforms/tools:



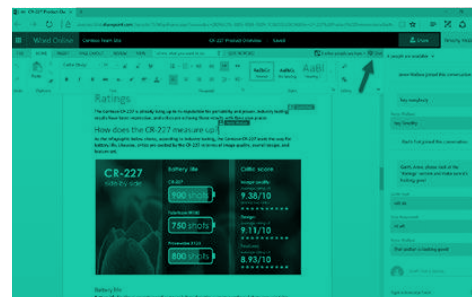
### Video conferencing – such as Zoom, Microsoft Teams or GoToMeeting

Explore the features and settings of each, such as Zoom's [polls](#), [breakout rooms](#), [whiteboard](#) and [seminars](#).



### Workshop live-collaboration – such as Miro, Mural and Trello

These 'live editing' tools allow participants to write, draw and edit ideas and insights like they would in a real-life workshop situation. You can choose for all participants to contribute, or just have one or two facilitators.



### Cloud-based office suites and file sharing

Cloud applications, such as Google Drive or Microsoft 365 can be used for live-collaboration too – whether it be reviewing a document, creating a slide deck or sharing files before and after the workshop.

### 3. Recruit more than one facilitator and set responsibilities

Having more than one facilitator makes running a remote workshop much easier. Just make sure to set responsibilities and test the software beforehand. Roles could include lead facilitator, notetaker, timekeeper, 'Zoom controller' for example.

### 4. Allocate 10–20% more time than you would for a face-to-face meeting

Conversations can take a little longer over the internet. Make room for everyone to get used to the technology, as well as any technical difficulties that could arise.

### 5. Set up and share aims, agendas and templates beforehand

This will familiarise participants with any tools you're using beforehand and will give them a chance to ask questions and download any software they might need. Many have a large selection of templates you can edit too!

### 6. Set some rules and do your housekeeping

At the start of each workshop, manage expectations by talking through your agenda. Remember to set some rules – for example: 'people should try not to talk over each other' or '[Chatham House Rules](#)' (You could incorporate setting rules with your attendees into your warm-up activity)

Also, remember your housekeeping. For example, if you are recording your conference call – make sure you have permission to do so from all attendees (You may wish to gain written consent before the workshop).

## 1. Use a warm-up activity to help participants become familiar with the tools

Think of a warm-up as an introduction to let people know who they'll be collaborating with during the session and how. It will familiarise participants with the tools and save time and prevent issues later on in the workshop.

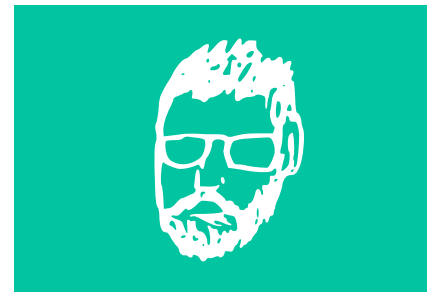
### Example activities



#### Check-In

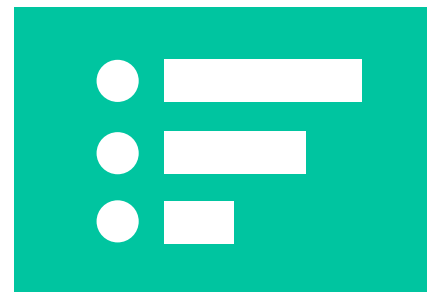
Get to know participants by starting each session with a 'get to know you' question. Answers should be limited to one sentence or one word and the facilitator can go first.

You can also use [this fun tool](#) to generate 'check-in' questions.



#### Sketch your neighbour

Assign each team member with another attendee's name. Using pen and paper (or online software like Miro), get participants to draw and then share your drawings by showing them on the webcam.



#### Host a quick quiz

Get participants used to the [Zoom polling capability](#) by hosting a quick quiz. This can also be insightful – ask questions about their thoughts related to your workshop topic before the workshop, and then ask the same ones again at the end to see if their thoughts have changed.

### 2. In large workshops, split off into smaller groups

Zoom and other video-conferencing tools have a feature for [breakout groups](#). As you might in a physical workshop, use this tool to split the participants into smaller groups for particular activities. Groups can be assigned by the host or randomly generated. As a host, you can jump between rooms and send alerts across all rooms.

(Note that settings such as breakout groups need activating before the call begins)

### 3. Manage the traffic

As the facilitator, ensure everyone gets a chance to have their say by directing questions or points at particular people. Some people may find it more difficult than others to speak up. Remember, as the host, you have control of the mute button – feel confident to ask people to go on mute – it will help you to control the conversation more effectively, and prevent the workshop from being dominated by a small number of individuals.

### 4. Have cameras turned on

Encourage your participants to turn on their cameras. It allows everyone to become more familiar with each other, but also allows you to read people's reactions and energy.

### 5. One remote, all remote

On the occasions where some participants are remote and others are all in the same room – consider taking a 'one remote, all remote' approach to ensure inclusivity. By having everyone using separate screens, those who are away will find it easier to hear and be part of the conversation.

### 6. Avoid video call fatigue

Avoid 'video call fatigue' by incorporating breaks and splitting workshops up into smaller activities or more than one session. Make sure to check-in with your participants and do an ['energiser activity'](#) if they need it.

### **7. Reduce likely distractions where possible**

Whether you're facilitating or just participating, you should close any Instant Message apps and websites if they're not needed (e.g Slack or emails). They can be distracting and it helps to keep your attention on the meeting. It's also helpful to mute your microphone when you're not speaking.

### **8. Conclude and acknowledge contributions**

At the end of each activity, and especially at the end of the workshop, make sure to conclude your findings, thank everyone for contributing and let them know what the next steps are (and if you need anything else from them post-workshop).

### **9. Embrace the quirks of remote working**



There's only so prepared you can be. Mistakes will happen, the internet will drop out, and children will interrupt. It can be embarrassing, but after all, we're human. In a busy week of video calls, quirks in your workshop might just make it the one that people remember.



### **1. Allow time for networking between participants**

If the time is up but conversations are still active, ask your attendees if they'd like to stay on for a little longer. If you have to leave, make someone else a co-host. You could also encourage further discussion over Slack or Twitter for example.

### **2. Give participants time to go away and think**

When possible, give participants an opportunity to add further notes or comments to your workshop once it has finished (but set a deadline). It can take some time to think of responses or develop ideas, or they may not have had a chance to have their say the first time around.

### **3. Share your findings**

It's key for your participants to feel like their contribution and time was appreciated, and so it's important to share your conclusions and findings with them post-workshop. Make use of this engaged audience and keep them up to date with the project. They're more likely to want to contribute again if they feel like their thoughts are being listened to.

## Further reading

---

Still want to know more? We've found some great articles and webinars around the web:

**How to Start Collaboration with Miro** – [Click here](#)

**The Definitive Guide to Facilitating Remote Workshops** – [Click here](#)

**What I've learned from facilitating over 100 remote collaborative workshops** – [Click here](#)

**Mastering Remote Workshops** – [Click here](#)

**The best design tools and plugins for everything – Collaboration Tools** – [Click here](#)

**Fun ice breaker questions and games for teams (remote and in-house!)** – [Click here](#)

**Online Warm Ups & Energizers** – [Click here](#)

**Open source alternative to Zoom** – [Click here](#)

The Human-Centred Design team is made up of the Human Factors & Research Team, The Insight & Service Design Team and the Creative Studio Team.

If you'd like to contribute to future versions of this document, or if you'd like to hear more about our services and workshop support, get in touch with:

**Liam Dargan**

Service Designer on the  
Insight & Service Design Team

[liam.dargan@cp.catapult.org.uk](mailto:liam.dargan@cp.catapult.org.uk)