Virtual First: Effectiveness Kit

Workshop prep worksheet

Before you set an agenda or send an invite, make sure you have clear and focused goals.

Question

The goal of this workshop is...
Why do you need a workshop, and what do you want to accomplish?
(ex: team building, creating consensus, understanding user needs, generating a roadmap)

The answers we need are...
What questions do you need to answer?
What problems do you need to work through?

The people who need to join are...
Who are the key people with the right information that will help answer questions and solve problems?
(Consider who has the power to make decisions—ideally 5–10 people.)

Our takeaways should be...
What tangible results should the workshop produce?

Success will look like...
Determine how you’ll measure success, including any must-have deliverables to come out of the workshop.