



8 tips for running a successful UX workshop



1

Clearly define the purpose and objectives

Ensure everyone involved understands the workshop's goals. Collaborate with stakeholders to clarify the business problem and expectations for the outcomes.

- **Prepare the Audience:** Provide workshop goals to participants 24 hours in advance to ensure more productive discussions.
- **Be Pre-emptive:** Put people at ease by letting them know that we are in exploration mode and this can feel "icky" at times.
- **Get Stakeholder Buy-in:** Secure buy-in from key stakeholders to assure support, participation and successful outcomes.



2

Plan the logistics well in advance

Book the appropriate location, set up all necessary equipment, and ensure the technology works seamlessly. Make sure everyone is aware of the schedule, whether attending in person or virtually.

- **Align on Tools:** Agree on video and collaboration tools beforehand to ensure they fit the workshop's needs.
- **Use a Facilitator:** Assign a facilitator who will focus on logistics to ensure smooth execution.
- **Use Planning Tools:** Utilize planning spreadsheets and tools to organize a smooth flow.



3

Carefully select participants

Gather a diverse group of participants, including users, designers, developers, and business stakeholders. This will provide a balanced set of perspectives to enhance the workshop discussion.

- **Invite Key Stakeholders:** Engage influential participants to foster impactful discussions.
- **Avoid Misfit Attendees:** Use a checklist or framework to define suitable vs. unsuitable participants.
- **Seek Fresh Perspectives:** Invite individuals from outside the usual group to stimulate critical thinking and generate valuable questions.



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Prepare a detailed agenda

Outline every part of the workshop, including timing, activities, and objectives for each section. Keep the agenda focused but flexible enough to allow for discussions or pivots.

- **Create an Engaging Structure:** Plan timed activities, discussions and breaks to keep participants interested and involved.
- **Create a Virtual Space:** Bring virtual participants together in a shared space, such as a digital whiteboard, to enhance engagement.

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Facilitate with structure, but flexibility

Keep the workshop on track, guiding discussions towards achieving the goals. Use structured activities like brainstorming or sketching, but be flexible enough to explore new ideas.

- **Clarify Roles:** Clearly defining roles upfront helps participants understand their contributions. Identifying who is leading the session ensures direction and accountability.
- **Be Prepared for Change:** Read the room as you go and adapt activities to meet the needs of your participants and the desired outcomes. Don't be afraid to postpone the workshop if engagement is extremely low.

6



Encourage active participation

Ensure everyone is contributing their ideas. Use methods like post-its or whiteboards to visualize thoughts. Create a comfortable space for all voices to be heard and avoid domination by a few individuals.

- **Foster a Safe Space:** Create an open environment where participants are free to ask questions. Include question and feedback periods in the structure of the workshop.
- **Be Strategic:** Find ways to engage hybrid participants and encourage junior members to speak up. Consider pairing juniors with executives, breaking hybrid participants into groups, and using chat functions to engage with introverts.

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Collect and analyze the insights effectively

Capture all the feedback, ideas, and discussions during the workshop. Use tools like mind maps or affinity diagrams to make sense of the data and look for patterns or insights.

- **Visual Summaries:** Use visual tools like charts or whiteboards to organize ideas for easy reference. Prepare ahead of time for accessibility needs.
- **Assign Ownership:** Designate individuals responsible for follow-up on specific actions or decisions.

8



Deliver clear results

Compile the findings from the workshop into a well-organized report or presentation. Share actionable insights with stakeholders and align them with the project's next steps.

- **Document Outcomes Clearly:** Ensure all workshop results and insights are easily accessible and organized for future reference. Establish a consistent format for recording key takeaways, decisions, and next steps.
- **Set a Follow-Up Session:** Plan a check-in meeting to revisit goals, evaluate progress, and adjust future plans as needed.



Tools & Resources

Here are some helpful resources to spark ideas for your next workshop. These tools can support smoother facilitation, clearer documentation, and a more engaging workshop experience!

Digital Whiteboards:

For collaborative brainstorming and visual organization.

- [Miro](#)
- [MURAL](#)

Polls & Surveys:

Collect real-time feedback and keep participants engaged.

- [Mentimeter](#)
- [Slido](#)
- [Google Forms](#)

Time Management Apps:

Keep sessions focused and on track.

- [Time Timer](#)
- [Pomodoro apps](#)

Icebreaker Tools:

Start with energizers to build connection among participants.

- [Kahoot!](#)
- [Quizlet](#)
- [Pebble Talk](#)

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This document is a culmination of our 'Workshopping the Workshop' event on Oct 24, 2024. We dove deep into understanding why some workshops fall short and what sets successful ones apart. We hope these key takeaways, tips, and best practices help you host your best workshop yet! Special thanks to TorCHI for helping to make this happen.

