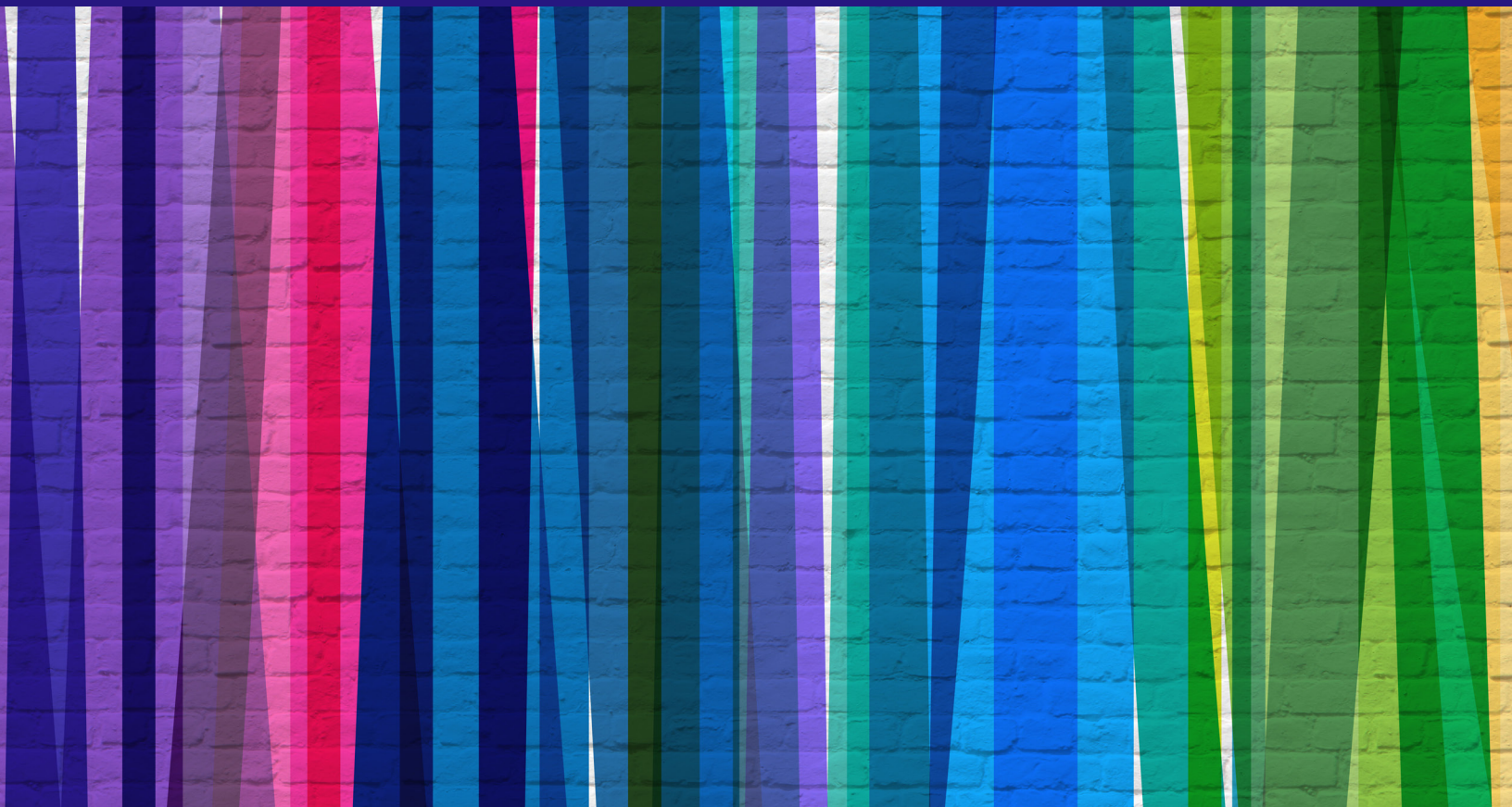


# The *Art* and SCIENCE of Workshop Design

Session Workbook: Information Architecture Conference 2021

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# PREPRODUCTION



# PREPARATION TOOLS

## MEETING CANVAS

A warm up worksheet that is useful for starting to identify your meeting needs and outcomes. You may find this helps as you brainstorm with your session leaders or stakeholders.

**MEETING CANVAS**

**Who is your audience?**  
 1. Who are the people that are attending? What might that happen look like coming into the session?

**What is this meeting's purpose?**  
 2. What is the reason you are bringing this meeting? Is there a shared concern that is bringing you all into the room together?

**What are the desired outcomes of this session?**  
 3. What does a successful meeting look like? What are the key behaviors from the audience?

**Are there specific roles and/or skills you want in the meeting?**  
 4. What are the specific things that you need to be completed by the meeting, and you are looking for a number of people that can contribute to support those needs?

**Which activities/exercises do you want to include in your session?**  
 5. What are the activities/exercises that you want to include in your session? Write, map, or sketch out the activities/exercises you want to share your audience through.

**What content do you want to convey?**  
 6. What are the key messages, data, or information that you want to convey? What are the key points that you need to convey? What is your call to action?

**What is your action plan?**  
 7. What are the key actions that you need to take? What are the key responsibilities that need to be taken on by the meeting? What are the key actions that you need to take?

## MINUTE TO MINUTE

This tool emerged as a useful way to organize the “run-of-show” for more complex exercises. Download from the class provided Google Drive folder.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
Workshop Purpose	[fill in]													Total time	240
Workshop Outcomes	[fill in]													Remaining time	0
			[set start time below]												[plug total minutes into 0]
Module				Module 1: X				Module 2: Y				Module 3: Finale			
Segment	Setup	Settle in the Room	Presentation/ Activity 1	Presentation/ Activity 2	Presentation/ Activity 3	Break	Presentation/ Activity 3	Presentation/ Activity 3	Presentation/ Activity 3	Meal Break	Presentation/ Activity 4	Presentation/ Activity 5	Exit		
Time Start	7:45 AM	9:00 AM	9:15 AM	9:35 AM	10:05 AM	10:25 AM	10:35 AM	10:50 AM	11:10 AM	11:40 AM	12:10 PM	12:40 PM	1:00 PM	1:00 PM	
Time End	8:45 AM	9:15 AM	9:35 AM	10:05 AM	10:25 AM	10:35 AM	10:50 AM	11:10 AM	11:40 AM	12:10 PM	12:40 PM	1:00 PM	1:00 PM	1:00 PM	
Minutes per segment	60	15	20	30	20	10	15	20	30	30	30	20	20	20	
Elapsed time		15	35	65	85	95	110	130	160	190	220	240			
Lead															
Stage Manager															
Timekeeper															
A/V Capture															
Purpose	Set up room, set up tech, move props and materials into place	Participants arrive, gettle settled				Maintain energy				Refuel, maintain energy			Farewells out		
Activity															
Groupings / Space															
Logistics															



**ROLL UP!**



# ICE BREAKERS

The goals of an icebreaker are to put people at ease, give folks the chance to become familiar with one another, and prime the team for the work to be done. The weakness of the most common icebreaker (tell us your name, the department you work for, and why you're here) is that it sets an uncreative tone, requires people to justify their presence, and produces answers that are typically long-winded, not interesting, and unhelpful to group dynamics.

The design of a specific icebreaker varies with the makeup of the group, the purpose of the meeting, and the amount of time you'll have together. In any case, when designing an icebreaker, ask yourself: what experience do you want to create for this session and these individuals?

## QUICK ICEBREAKERS

**Please tell us your name [and your role on the project]. Then:**

- Think about your trip to get here today. Would you call it an opera, a tragedy, or a comedy? And why?
- If you had to choose, would you work in a library, a museum, or a zoo? Why?
- Pick a cuisine that best describes your personality, and why.
- What superpower would you choose? What's the first thing you'd do with it?
- Are you sunrise, daylight, twilight, or night? (or What's your favorite season?) Why?
- Pick your favorite thing you can see from where you're sitting and describe it to the group. [This one works well with remote participants.]
- If you were a candy wrapper, what name would you be?
- What's the title of your next album?
- What's the best thing that happened to you this year?
- Would you rather...

## ADVANCED ICEBREAKERS

- **The Marshmallow Challenge**  
Use this exercise to build collaboration and explore the role of failure and experimentation for teams. <https://www.commonsense.org/education/lesson-plans/the-marshmallow-challenge>



- **What's your favorite song?** - Throughout the day, if you break a rule (e.g..... work on emails), you'll have to sing the first verse to the group.
- **Weather Report** - How are you feeling today? Quick Check in, great after breaks or to get people back in the room.
- **Celebrity Doppelganger** - As participants enter the room they select a "celebrity lanyard" to wear for the duration of the meeting. For the ice breaker have each person share why they chose the doppelganger, e.g. I am like "celebrity" because...Fun pairs happen when interesting celebrities sit next to each other. Be sure to have a diverse set of celebrities so your group has celebrities that resonate with them. Provide in write up celebrity cards just in case someone does not find their favorite star in your group.



# ENERGY AND WELLNESS RESOURCES

We ask a lot of ourselves and our participants during workshop sessions - focus, creativity, intense effort, and true collaboration. The duration each day is probably longer than anyone's typical engagement with a single problem or task. When it's going well (or not well), it's easy to forget about our physical needs. If don't eat healthy foods or stretch or renew our energy, eventually our enthusiasm and ability to engage will suffer.

Support your team members and workshop participants by providing time and tools for focus, physical exercise, and healthy foods to fuel our bodies and our brains.

## ACTIVITIES TO START THE DAY

A brief guided meditation or mindfulness practice is a great way to calm any anxiety the group members are feeling, center the team's attention on the work at hand, and spark creative thinking.

If possible, find a wellness coach who can lead an in-person session. Videos and audios file can also be used.

Favorites include:

### **90 Second Breathing Space**

<http://cdn.franticworld.com/wp-content/uploads/2015/11/Track-3-The-90-Second-Breathing-Space-by-Dr-Danny-Penman-From-book-Mindfulness-for-Creativity.m4a>

### **2 Minute Meditation**

[https://www.youtube.com/watch?v=rLXM-HC\\_69g](https://www.youtube.com/watch?v=rLXM-HC_69g)

### **Yoga at Your Desk**

<http://yogawithadriene.com/yoga-desk/>

### **Deepak Chopra 3-Minute Meditation**

<https://www.youtube.com/watch?v=4Bs0qUB3BHQ>





## ACTIVITIES TO ENERGIZE THE GROUP

A full day of concentrated work and computer time can be very draining. It's critical to make time for brief periods of exercise to re-energize the group. Add breaks after 90 - 120 minutes of work, and particularly after lunch.

These breaks do not have to be long to be effective. Three to 10 minutes can be enough to revive a group with flagging energy.

Favorites include:

**Walking outside or inside**

**Marching in place**

**Simple stretches, especially for the upper back, shoulders, and hips**

<https://assets.themuse.com/uploaded/attachments/17130.jpg>

**4-Minute Neck and Shoulders Stretch at Your Desk**

<https://www.youtube.com/watch?v=vLPfP1oRJFM>

**5 Minute Office Stretch Break**

<https://www.youtube.com/watch?v=EG2fEkO4X1w>

**Seated exercises**

<https://www.youtube.com/watch?v=9U0dLLf1HQE>

## HEALTHY FOODS

Keeping the group fueled with healthy snacks, liquids, and meals is important to successful workshopping. Provide super foods that give energy and boost our brain power. This can include a variety of vegetables, fruits, nuts, and whole grains in individual servings for the team to eat whenever they need it, as well as water and tea. Avoid bad mood foods that take away energy, like sugary, fatty, and highly processed choices.

Favorites include:

Fruit (bananas, raisins, pre-cut fruits)

Protein (nuts, yogurt)

Vegetables (baby carrots)

Grains (power bars, oatmeal cups)

Chocolate (in small amounts)



## **AVOID**

Cookies

Donuts

Sugary drinks

Chips



# NAVY SEAL RELAX UNDER PRESSURE MEDITATION (3 MINS)

This exercise uses Navy SEAL techniques to relax under pressure.

Get into a comfortable position. You can allow your eyelids to close, or if you prefer, keep them open.

## **[CALM BREATHING]**

Start by being aware of your breathing. Breathe in... and out.

Deeply in... and slowly out.

Keep breathing slowly like this.

To further relax, breathe in through your nose and out through your mouth.

Deeply in... and slowly out.

Keep breathing... letting your breath slow comfortably.

*(Pause)*

This calm breathing helps you focus, and be alert and relaxed.

Breathe naturally, now. Every so often, just notice your breathing, and allow your breathing to slow down.

*(Pause)*

## **[RELAX TENSE MUSCLES]**

Now concentrate on your muscles, anywhere you're holding tension.

Consciously lower your shoulders and allow the muscles to loosen.

Relaxing your shoulders helps you become calm. It places you in a ready, easy position instead of a tense one.

Notice your hands, and let your hands be open, loose, and relaxed.

Let your arms hang comfortably from your shoulders.

Rest your hands comfortably on your lap.



Let go of all tension and just relax.

**[CALM YOUR THOUGHTS]**

Now calm your thoughts.

Listen to each positive message that follows, and consider it to be true.

You may want to repeat each phrase silently in your mind.

I am calm.

I am relaxed.

I handle situations with ease.

I am prepared.

I am focused.

I am alert.

I am confident.

I am capable.

I am skilled.

I am relaxed.

(Pause)

Whenever you're preparing for action, you can remember these three techniques:

Calm breathing.

Relax tense muscles.

Calm your thoughts.

(Pause, pause)

Now it's time to bring your attention back to the room.

Feel yourself sitting in your chair.

Listen to the sounds of the room.

When you're ready, open your eyes, look around, and be ready for what's next.



# STRETCHING

Stretching brings energy to your participants not only getting participants moving but delivering valuable oxygen to the brain.

Stretches can be done seated or standing. Be mindful of your participants and the different ranges of motion that participants may be interested or able to complete.

1. Breathe stretch up, down. 2x
2. Hands in front lace fingers, press out, pull back, 2x, hands fall to the sides.
3. Breathe stretch up, swan dive down, touch the floor, tighten, release
4. Roll up vertebrae.
5. Hands behind back, lace fingers, pull back, chest out, hands fall to sides.
6. Hands overhead, lace fingers, stretch up.
7. Stretch to the left. Stretch to the right, hands fall.
8. Shake it out a little bit.



# WORKSHOP AGREEMENTS

Communicate your workshop customs and practices at the outset, so the whole group can agree on a way to work together. To arrive at an even more powerful contract, you can even start with an exercise to develop your agreement as a group.<sup>1</sup> Here are the main components of a strong participant agreement.<sup>2</sup>

## DIALOGUE, NOT ARGUMENT

Socrates and his friends spent years holding conversations that helped shape Western civilization. While energetic discussions took place, things rarely got out of hand, because everyone agreed to principles on how to share ideas.<sup>3</sup>

**Establish dialogue.** Dialogue means “talking through.” The basic rules are: “don’t argue,” “don’t interrupt,” and “listen carefully.” We use the phrase “Yes and...” to guide this kind of conversation.<sup>4</sup> Active listening helps us understand, not just respond.

**Ensure all voices are heard.** Everyone should participate, and everyone should enable others to join in. If someone is used to having her view prevail, she should also extend that privilege to others. If someone is used to keeping silent, he can lean into his discomfort and speak up. We practice engaging as equals by making “I” statements rather than “you” statements, by addressing the issue, not the person. We also need to keep the dialogue flowing. Try “ELMO” (Enough Let’s Move On) when you get stuck.

## E-MANNERS

Laptops and cellphones are an irresistible distraction. Researchers have found<sup>5</sup> that devices interfere with learning and active participation, both for yourself and for those around you. So, at in-person workshops, put your laptops away

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1 Seeds for Change <https://www.seedsforchange.org.uk/groupagree>

2 Sources include Diversity & Inclusion Training Part 1: Definition & Philosophy, AIGA National Leadership Retreat, May 31, 2018

3 Michael Michalko [http://www.creativitypost.com/pop-culture/what\\_einstein\\_learned\\_from\\_socrates\\_about\\_group\\_collaboration](http://www.creativitypost.com/pop-culture/what_einstein_learned_from_socrates_about_group_collaboration)

4 See Bob Kulhan’s summary at <https://www.youtube.com/watch?v=DphjudlZis>

5 OpenPSYC <http://youtu.be/WwPaw3Fx5Hk>

and turn off your phones. At online workshops, use your avatar or camera; signal “away from the meeting” by turning off your camera; and don’t multi-task. If you have a critical communication to attend to, please excuse yourself from the shared space and return when you’re ready.

## **RECORDINGS**

Each workshop is a unique learning and facilitation experience, so we routinely use photographs and recordings to capture the process and key outcomes. Pictures go into the after-workshop reports we deliver to our clients, and we can share photos when explaining concepts. At the same time, workshop participants must be able to opt out of having their likenesses captured. Inform your participants that you will be taking photos and other recordings. Ask people’s permission. Then honor the requests of everyone who asks that they not be photographed or recorded.



# PRODUCTION





# LIGHTNING TALKS (5 MIN)

## WHAT IS IT?

The purpose of a lightning talk is to provide the team with key information on a particular topic, and to put a face, name, and voice to a point of contact to whom the team can go for further information.

A lightning talk should be a short, high-level briefing of around 5 minutes duration. The idea is to keep preparation time to a minimum, while focusing your prep on distilling the talk to the key points. Don't try to pack everything into the talk. You're establishing yourself as the team expert for the topic, and people will reach out to you afterwards when they need more details and depth.



## When use it?

Use lightning talks to set the stage with key facts and concepts when starting a project, and to report out to the broader group after pod work. It can be used to summarize business goals, user needs, technical capabilities and challenges, user research, pod work results, and more.

## What form should it take?

Do what works! Just talk from your notes. Or create a deck if that helps you. Share images, do live demos, or bring in other materials if appropriate.

Lightning talks get referred to frequently during a project. They also make their way into reports and get reused across projects. If possible, the Delivery Manager should appoint someone to capture the gist of each lightning talk and share that in the team repository.

## INSTRUCTIONS

1. Write down the top 2-5 points you want to convey.
2. Write up some details about your key points.
3. Collect show-and-tell items, if appropriate (e.g. representative images, screenshots, URLs to a demo site).
4. Create a deck  
or  
Organize your notes and show-and-tell to be ready to present.



# TACHYON TALKS (1 MIN)

## WHAT IS IT?

The purpose of a tachyon talk is to provide a group with a nugget of information on a particular topic, activity, or work in progress, and to put a face, name, and voice to the point of contact to whom people can go for more information.

Similar to but faster than a lightning talk, a tachyon talk is limited to 1 minute. Tachyons can be delivered as part of a group knowledge sharing session that may include several or dozens of speakers. Each tachyon should include a single image representing what the speaker is sharing. The knowledge share organizer can assemble the images from all speakers into a single deck, which will be used to support the speakers and facilitate the session.



Speakers should focus preparation on distilling the talk to one or two key points. Don't try to pack everything into the talk. And don't try to pack everything into the visual. You're establishing yourself as the team expert for the topic, and giving them a visual reminder of the talk. People will reach out to you afterwards when they need more details and depth.

## INSTRUCTIONS

### Prepare the words

1. Write down the top 1 or 2 points you want to convey.
2. Write details about each item, and capture in a script or set of talking points.
3. Practice and time yourself, refine your script, and get comfortable with your delivery.

### Choose a visual

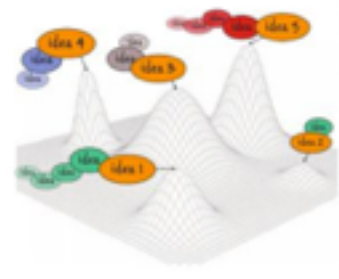
4. Use the Tachyon Talk Slide Template and create a single slide to represent the talk.
5. Include the topic, your name, and your group.
6. Send the slide to the knowledge share organizer.

# TEN PLUS TEN

## DESIGN THINKING EXERCISE

### Why?

If we start with a single idea and just run with it, our final design can only be as good as that first idea. Doing a great job on a so-so concept will still only produce a so-so solution. 10+10 is a Design Thinking exercise that lets us discover multiple possibilities and select the best approach.



### INSTRUCTIONS

- 1. State the design challenge.**
  - What's the problem to solve?
  - What do we think will help the user?
  - What are the problems that need to be solved?
  - What does the client need?
  - What systems do we have to work with? What are the constraints?
- 2. Working individually, quickly generate 10 different ideas that address the challenge.**
  - Brainstorm
  - Be as creative and diverse as possible
  - Extra credit for the most out-there ideas
  - Don't judge designs at this point
  - Capture the essence of the idea, not details
- 3. Working as a group, reduce the number of concepts and capture top ideas.**
  - Review and discuss all ideas.
  - Capture top ideas on sticky notes.
  - Choose the most promising concept(s) for further elaboration.
  - Use sketching to explain and get feedback on remaining designs from one another and representative end users

4. **As a group, produce 10 details / variations of that concept.**

- Where does the product fit in the user's work or life?
- When and how is our product used?
- How should our product look and behave

From Sketching User Experiences, Greenburg, Saul et.al, Elsevier, 2012



# REHEARSAL



# FACILITATION ROLE PLAY ACTIVITY

This improvisation activity gets participants practicing and observing the experience of facilitating an exercise. Using a short, straightforward exercise, the team works together to complete a Team Exercise together. Each team reports out what they experienced and learned.

Set the scene by providing each team with a business context. One individual acts as the Facilitator, and the others play other organizer or participant roles. To make it interesting, team members can adopt various positive or challenging characteristics.

## **Form the Team and Select the Domain (10 minutes)**

Your team of 4-6 people is designing a new product or service. Choose a domain. Then fill the roles. Each participant can augment their role with a dysfunctional persona, if they like.

### **Domain: Choose one of the following (or invent your own)**

- Utility company
- State economic development agency
- Museum
- Tech startup - eHealth
- Boutique eyeglass chain
- Adventure camp
- Food bank
- Bookstore/Coffee Shop

### **Roles: Fill the two organizer roles, then distribute participant roles (or invent your own)**

- Facilitator (organizer)
- Bard (organizer)
- Client
- Stakeholder
- Project manager
- Developer
- Art director



### **Prep the Organizers/Prep the Characters (5 minutes)**

Facilitators and Bards circle up to get briefed on the Team Exercise. As organizers, these two need to consider such questions as:

Who will explain the Team Exercise to their group?

Who will manage timekeeping?

Who will report out to the room afterwards (e.g. Bard or participant)?

### **While the Organizers are prepping, the Participants can take on a persona as part of their role.**

- Dominating Don
- Cautious Connie
- Analytical Anil
- Silent Sara
- Snarky Sandra
- Tangent Theo
- Workaholic Warren
- Negative Ned
- Electronics Eddie
- Spotlight Sam
- Latecomer Larry
- Passive Aggressive Polly

### **Do the Team Exercise (30 minutes)**

The Facilitator and Bard support the group in completing the exercise. For instance, the Facilitator leads the exercise, while the Bard observes and takes note of what is happening in their scenario. The Participants play their roles. The goal is to achieve the objective of the Team Exercise.

### **Discuss (15 minutes)**

Then break character and discuss at the table what you observed or experienced about facilitating or participating in that exercise.

### **Report Out to the Room (5 minutes per group)**

Either the Bard or a participant from each table described to the room how the Role Play activity went.



# FACILITATION ROLE PLAY TEAM EXERCISE - AUDIENCES AND NEEDS PLAN

## INSTRUCTIONS

### Work in the group (10 minutes)

- For your organization and division, identify the main customers who use your services or benefit from the work you're doing. List 3 audience types.

### Work individually (5 minutes)

- Quickly brainstorm problems each customer type has that your organization can solve. List 1 or 2 problems per type.

### Working in the group (15 minutes)

- Discuss your lists.
- Determine next steps. (For instance, what questions do you need to answer about your customers? What are your constraints? What do you need from your leadership?)

AUDIENCE & NEEDS	
DOMAIN / DIVISION _____	
CUSTOMERS	NEEDS
1. _____	• _____ • _____ • _____
2. _____	• _____ • _____ • _____
3. _____	• _____ • _____ • _____
ACTION PLAN:	





# FINALE



# CLOSING ACTIVITIES

The very last event at the end of a journey is usually the most memorable. This is certainly the case when your closing experience is either very positive or sadly disappointing. To help your participants get the most value from their workshop experience, make time for a real closing activity. Don't let the session trail off, or be about you. Bring it back to the participants with an activity that's crisp, useful, and definitive. In other words, make sure your session ends with a bang and not a whimper.

## SAMPLE ACTIVITIES

### **My Biggest Takeaway**

This simple activity is highly effective, and is useful when time is short. Have each person take 30 seconds to identify their top takeaway from the day. Two way to phrase this are:

- Tell us one thing you learned, or a key takeaway from today's session.
- How will what you've learned here impact you or your work?
- This activity creates a mood of consensus and validation in the room that allows all voices - whether positive or doubtful - be heard in the context of everything the group just went through.

### **Snowstorm**

People circle up. Everyone writes their biggest takeaway from the day on a piece of white paper. Crumple the papers, throw them up in the air, then pick up a random one. Each person reads the one they grabbed out loud. Then discuss.

### **Cover All**

Each person sketches a book cover. The title is their takeaway. The author is the participant. Also draw a cover picture. A celebrity puff quote would be a nice extra. Share with the group - or combine this with the Postcard Retrospective.

### **High School It**

Each person describes what got done that day in a way that would make sense to an engaged 9th grader (e.g... one who is going to organize a march, start a summer program, or run for office). Discuss.



# POSTCARD RETROSPECTIVE

The Postcard Retrospective is a pledge to practice. It encourages participants to reflect and commit, and allows them to indulge in a burst of creativity after a period of hard work. It also results in each person receiving a postcard a few days later – a time-delayed, cheerful reminder of what they experienced and accomplished.

## Instructions - Participants

Use sticky notes and write down 2 or 3 things you commit to exploring, learning, or doing as a result of your work over the innovation session. The test of whether you've got the right notes is how you feel when you read them. Keep stickies that make you feel upbeat, inspired, or interested. Leave out or re-imagine any note that makes you feel stressed, tired, or otherwise negative.

Place the stickies on a blank sheet of paper, and embellish the paper with additional drawings, collaged images, or other materials that reflect what you've experienced.

Take a picture of the collage, or have a facilitator photograph it for you. Then upload it to a online location that can be retrieved by the facilitators, along with the mailing address where you want to receive your postcard.

## Instructions - Facilitators

Assist participants in uploading a photo of their collage. Make sure a mailing address is associated with each one. Use a postcard-creation service to make and send the cards. Two mobile- and web-based options are Touch note (<https://web.touchnote.com/#/cardBuilder>) and MyPostcard (<https://www.mypostcard.com/en/>). A mobile-only option is Postagram (<https://sincerely.com/postagram>); there are many others.

## Resources

The Art of Good Openings and Closings, Beth Kantor  
<http://www.bethkanter.org/trainers-notebook>

Designing an Innovative Workshop Exercise, Stacy Surla  
<https://medium.com/@stacysurla/designing-an-innovative-workshop-exercise-5dcdb3c644b2>

Memorable Debriefs for Memory and Retention, Susan Doctoroff Landay  
<https://elearnmag.acm.org/featured.cfm?aid=1999654>

# NOTES



A collection of ideas and possible actions in the form...

***“I will \_\_\_\_\_ so that \_\_\_\_\_ .”***





**TAKE NOTE...**

