

**DESIGN
PROVISION**



ONLINE WORKSHOPS TOOLKIT

TIPS NOT ONLY FOR DESIGNERS

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ONLINE WORKSHOPS IN DESIGN PROCESSES

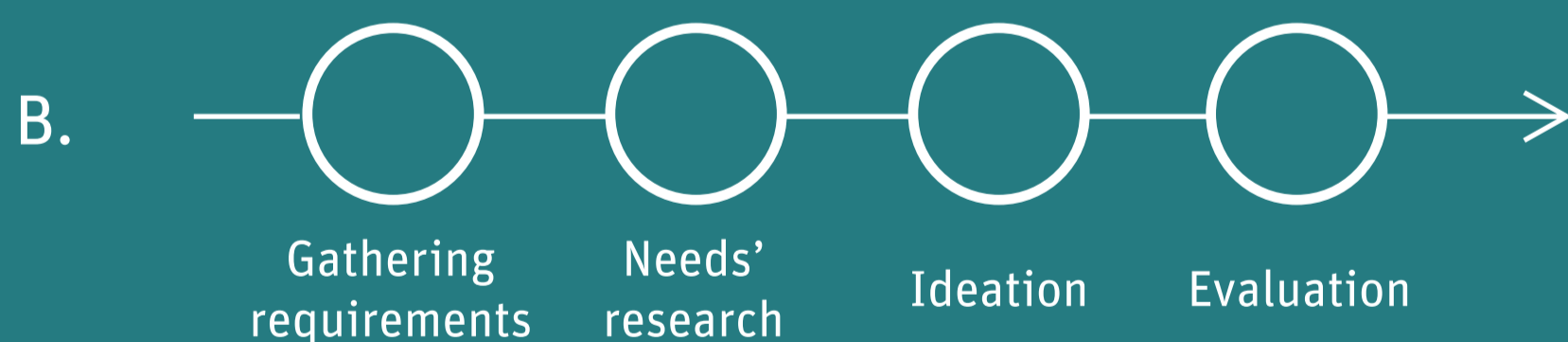
With a limited possibility of using physical equipment, it is quite a challenge to run a remote design workshop. That is why a group of designers specialised in the fields of User Experience (UX) and Service Design joined forces to create this Toolkit. It offers a handful of recipes which will help you prepare and conduct perfect workshops without ever meeting the participants in real life. The following tips will come in handy especially for designers and facilitators.

Workshops are a natural way of work for designers. They are practical, collaborative meetings in which non-designers can also take part. They are planned and use a set of research-design methods and techniques. Their goals can vary from establishing a project's demands, through identifying users' needs, to generating ideas and working on a plan to put the solution in motion. Workshops can be a one-time event, such as an idea-generating session, but they can be, just as well, a series of meetings, becoming an integral part of a longer design process. Online environment imposes a lot of restrictions... But it offers new possibilities, too.

MODELS OF WORKSHOPS' REALIZATION



One-time event



A series of events



Hybrid model

KEY ELEMENTS OF ONLINE WORKSHOPS IN DESIGN PROCESSES

We have identified five key elements, which influence the effectiveness of online design workshops. All of them both affect participants' experience and shape the outcomes of team cooperation.

A. Define the roles of people leading the workshop

Leading workshops remotely is much more difficult than it is under regular circumstances. The leader is responsible for bringing the group all the way to the end. However, compared to real-life workshops, the leader has fewer means of controlling the actions of other participants, let alone providing comfortable work conditions.

Good practice:

- Find the balance between planning and spontaneity, not everything will go according to plan and you have to be ready for it; the most important thing is to support participants in their creative process and offer them support, both technical and content-related.
- Allow the group to independently come up with rules of cooperation, accept their attitude towards time-keeping and communication; write down the rules in a well-visible place, such as a shared board, and make sure everyone agrees with them. Remember, this contract is written by you together with other participants, so that you can return to it in difficult situations; you don't have to use it, but it can come in handy.
- Refrain from working alone. When planning workshops, secure support from at least one person; you may distinguish between several roles: the leader, the assistant(s), and technical support.
- Sometimes, one person needs to take on two roles, for example an assistant might need to fulfil some responsibilities of a technical support.
- Mute participants' microphones when the noise threatens to disturb the session or ask them to do it themselves whenever they hear any noise; it's worth to lessen the number of 'distractors' such as social media (suggest putting away phones, maybe even storing them in a special bag for the time of the workshop).

Styles of conducting workshops:

MODERATOR

Has more direct approach; provides information, instructs how to deal with a task, keeps track on whose turn it is to speak, is responsible for completing the goals and, sometimes, sets the specified direction of a workshop.

FACILITATOR

Has more explorative and interpretive approach to hosting a meeting; creates optimal conditions for cooperation, giving participants a space for their own initiatives and decisions, inquires rather than dictates answers, takes care of communication between workshop participants, neutralises conflicts.

Roles:

- **LEADER** – keeps track of the meeting's path, introduces and supervises discussions, explains a task's instructions.
- **ASSISTANTS** – note down conclusions and changes, keep track of time, assist participants during group activities.
- **TECHNICAL SUPPORT** – creates groups, answers comments in the chat, deals with technical issues.

B. Build online relations

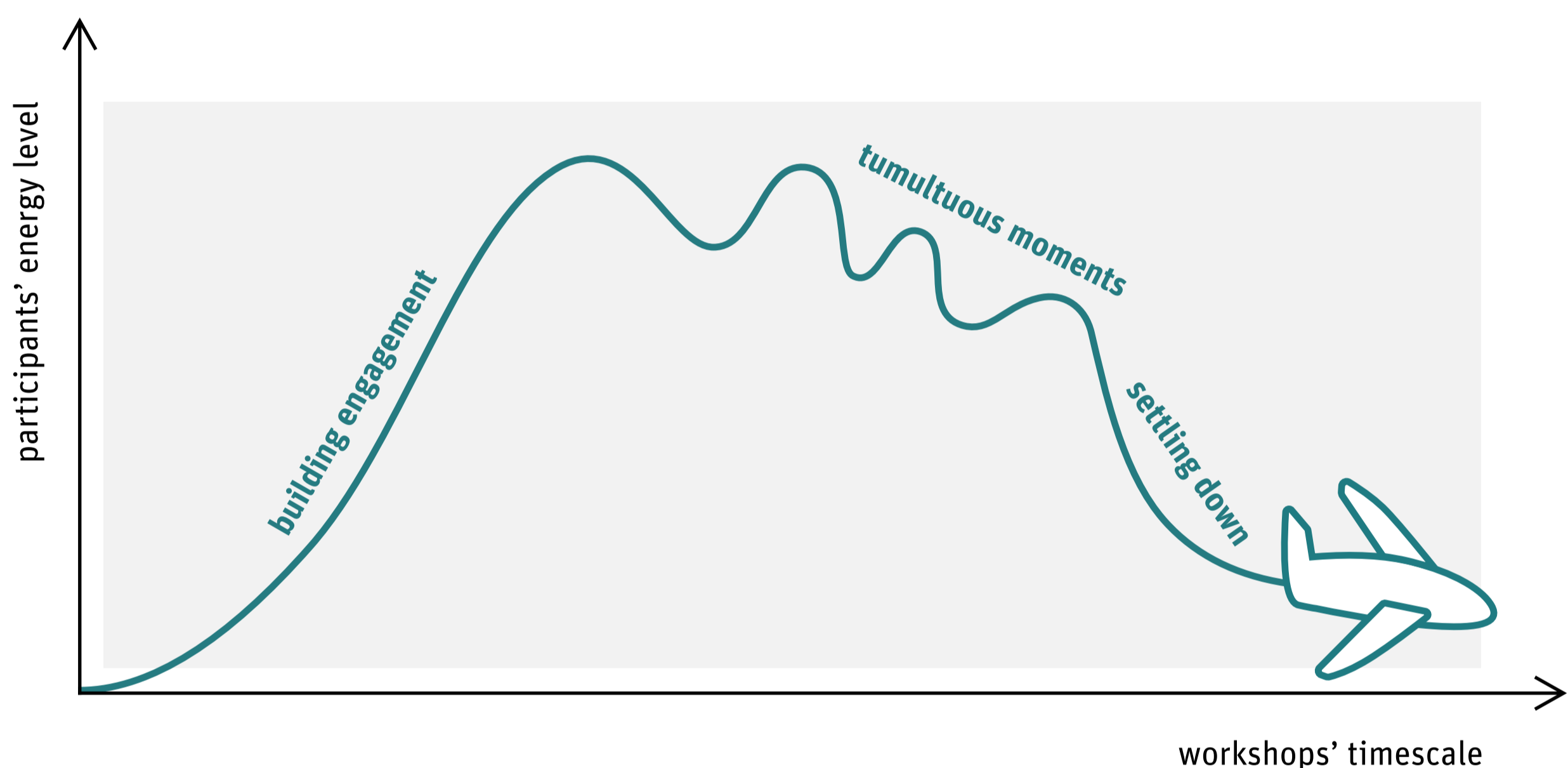
A bit of mystery, spontaneity, an occasional surprise, or a ritual – these are the means of building relations, also online. In real life, we have a plethora of actions which help us get used to a new situation, a handshake, a small talk. Forms of communication such as these are worth using in remote work, too.

Good practice:

- Start each part of the workshop with a small interaction, ask some questions which will allow participants to get to know each other: ‘What surprised you the most?’ ‘What is your favourite dish?’
- Plan something unconventional, a kind of surprise: this can be a special guest joining for a few minutes of the session, or maybe an invite for the parents to let their children say hello to other participant’s children.
- Express your emotions using your hands, maybe even the whole body; for example, you can show a thumb-up or applaud lightly to manifest your support without disturbing someone else’s speech; you can do a remote high-five (warning: this means that you need to work with your camera constantly on).
- Use the chat: encourage participants to ask additional questions, complement each other, share inspirations, comments or emojis, all without disturbing someone else’s speech.

C. Manage your team's energy and concentration

An online environment is full of 'distractors' which affect the team's energy, concentration, and engagement, such as chat notifications, children playing in different rooms, delays in sending data, glitches. However, distractors will become a smaller obstacle if we make sure there is enough of captivating activities. Management of energy during workshops could be compared to flying a plane: what's important is to quickly achieve high engagement, which we can then stabilise for a longer time, before, finally, allowing it to settle down in preparation for reflections.



Good practice:

- Engage the participants, as soon as possible, in activities, which won't let them stay in the 'observer' mode: ask questions, generate ideas, prioritise.
- Make good use out of nonverbal speech, pictures, and manual works: less talking more activity and co-creation.
- Encourage the participants to get out from behind the screen during breaks, you can also propose some easy exercises like bends or stretching.
- While sharing feedback on an exercise, you can ask each group to fill in the gaps in the former team's presentation. This will not only force others to listen carefully but also facilitate a feedback discussion.

D. Conduct ideation in its online version

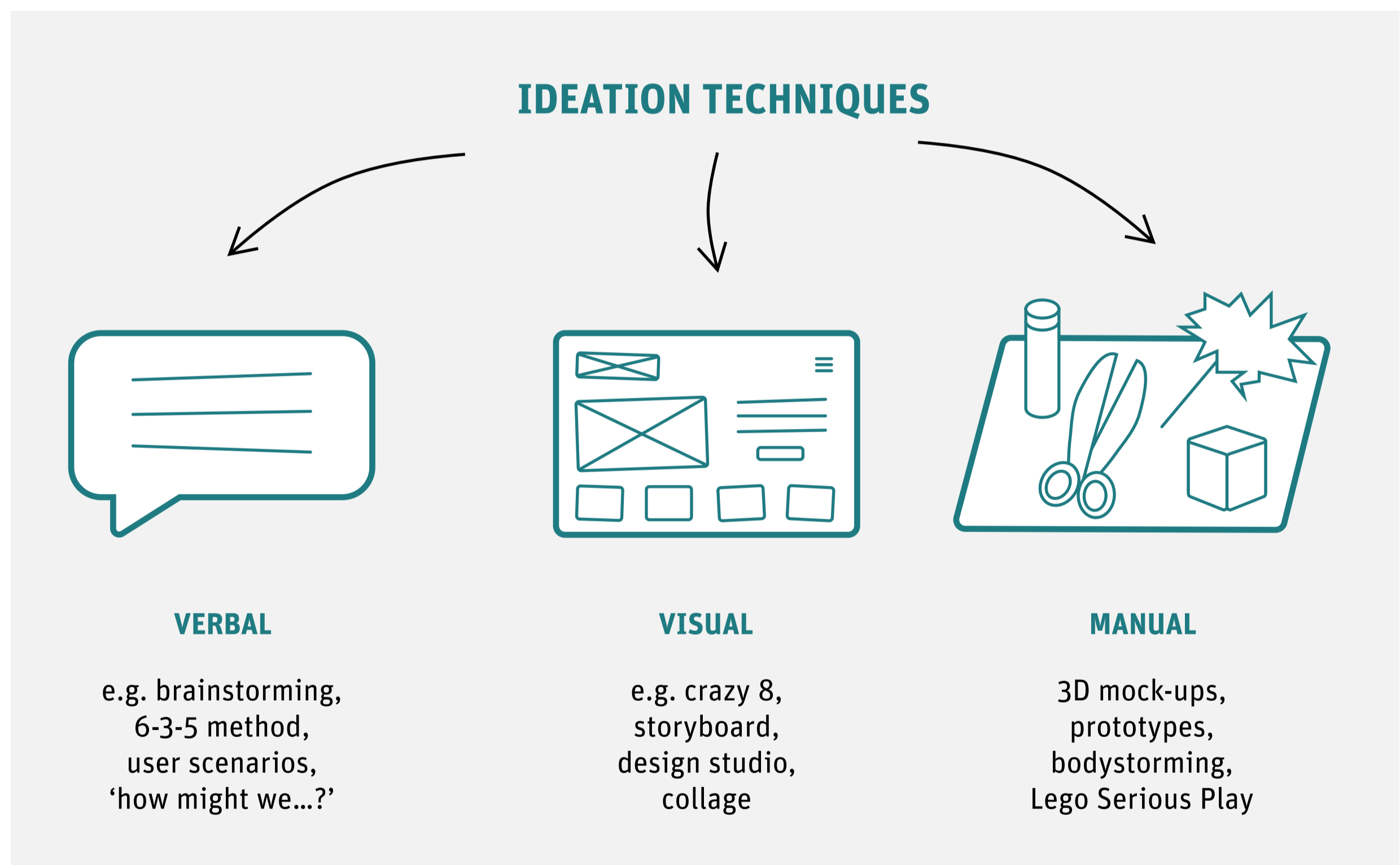
Ideation in a remotely controlled environment requires organization, flexibility, and good humour. Combined together, these three features provide conditions which encourage participants to look for unconventional solutions and exchange ideas between each other. There is a set of workshop techniques which facilitate this process and give it a clear structure. Techniques of generating ideas can be sorted into three groups: verbal, visual, and manual. Remember that instructions to each task should be constantly visible to all members.

Good practice:

- Intertwine various methods of generating ideas – verbal, visual, and manual – during one session; an example of working with words is a brainstorm or a 6-3-5 method, visual methods include drawing ideas with aid of such techniques as Crazy8, storyboard or design studio (Zoom, Mural, and Miro have built-in drawing options), while manual methods consist of creating 3D artefacts by yourself, for example with prototypes out of Playdoh or LEGO blocks.
- In the case of verbal techniques, you can take advantage of the chat function in the application you're using for a videoconference, shared boards (Miro, Mural) or shared documents (Google Docs); by writing down ideas in a shared file, everyone has a direct access to others' work, all materials are already digital which makes them convenient for processing after the workshop.
- While using visual techniques, you can employ digital tools or a normal sheet of paper and pens (We recommend thick, opaque pens: black, green, blue, red); each participant can show their results by presenting their paper to the camera.
- In online work, techniques based on movement are worth using. These can be, for example, bodystorming or the use of printed pointers with which you can indicate which participant will be speaking next.
- Before workshops, share with participants a set of all materials necessary for an ideation session. Therefore, each one can work individually ahead of time, and then show their prototype in front of a camera or document it in a form of a photo.

Good practice:

- Make sure to keep the flow of constant communication and exchange of results between the participants (sending photos of prototypes and drawings through communicators) – thanks to that the members will develop ideas created by others.
- Make sure the evaluation of ideas is an independent part of a workshop; evaluation techniques consist of: bullet voting, ideas evaluation matrix (Mural and Miro have an in-built voting function). Cards (for example [IDEO Lifeline Cards](#)) can help in the process of evaluation, too.
- During ideation and evaluation, remember to devote some time to reflection over each idea.



E. Consider cultural differences

Online design workshops are an opportunity for many people from different countries to meet in the same (virtual) place, at the same time. However, each of them can find themselves in a vastly different context, in a different time zone, maybe even in a different year. These factors can determine their levels of energy and engagement.

Good practice:

- If you are hosting online workshops, try to understand the cultural context of all members. A helpful tool can be [Hofstede Insights](#), which allows for a cultural comparison in six dimensions. Additionally, there are some tools for developing cultural sensitivity created especially for designers, like [Crossing Cultural Chasms](#) cards or [Cultura](#).
- If, because of clashing time zones, you cannot find a fitting time for the meeting, you can organise a workshop session in two smaller subgroups.
- By sending workshop materials in advance, you will neutralise the issue of time zones. The bigger the geographical distance between the participants, the more frequent asynchronous communication will be.
- Language barrier can indeed cause disturbance in your communication flow. In such a situation, take away the strain from each member by organising shorter sessions and introducing visual and manual techniques; during workshops in a multicultural environment, the universal language of pictures proves most useful.
- At the beginning of a meeting, remember to bring everyone's attention to their multicultural backgrounds. What for some is acceptable, for others may be a cultural taboo. Workshop instructions aimed at the participants should be clear, direct, best explained through examples.
- Make sure to always give feedback. Some cultures have an ingrained over-criticism in them, while others tend to be more optimistic, yet other ones can see an act of sharing opinions as inappropriate.

HOW TO GET STARTED?

The phase of preparation and realization of workshops can be organised into four steps: planning, preparation, directing, and summary. At first, it seems easy enough but the success lies in the details.



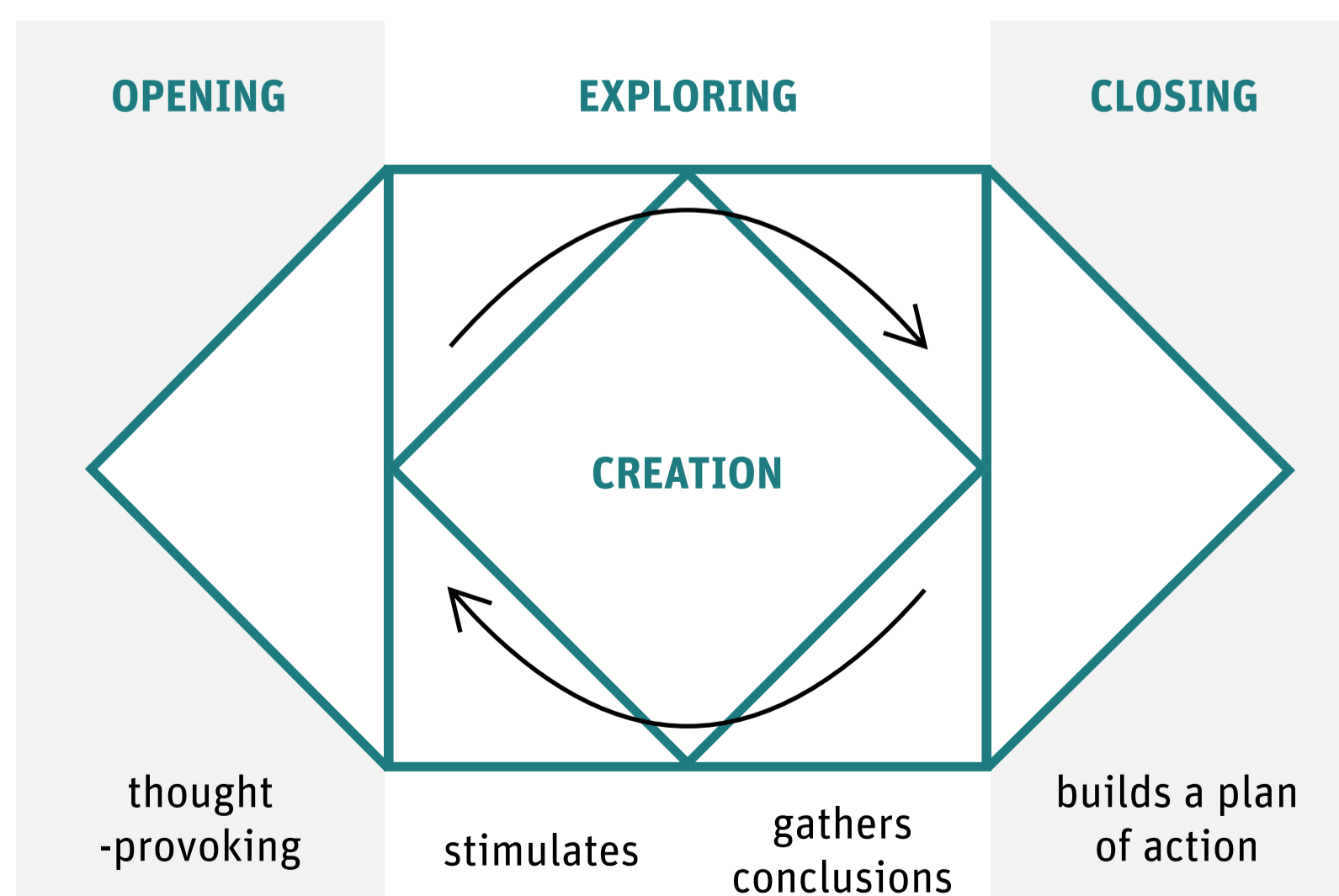
STEP 1 - PLANNING

Before a detailed agenda comes to life, you need to specify workshops' goals, a list of participants, workshop's timescale. It is helpful to answer the following questions:

- at which stage of the project are you: is it the beginning or are you already planning an ideation session?
- what are the goals and expected results of the planned session?
- who will take part in the workshop? (who should? who can?)
- how much time do you have to prepare the meeting?
- how long should the workshop take? And how long it actually can take given your and the team's capabilities and time limitations?
- what deliverables should be created during the workshops?

Knowing the answers to these questions, you can pick and design workshop techniques, which will suit your goals, the team's size, and time restrictions. A three-stages workshop structure is quite useful for this: the opening, the exploration and the closure:

- **Opening** – techniques which support the building of relations in the group, force you to think and open discussions,
- **Exploring** – techniques which support teamwork, creative problem-solving, and reaching your goals,
- **Closing** – techniques which foster decision-making and the planning of future activities.



What must be done?

- talk to your team and your client, list all goals for the workshops,
- check the availability of key people, schedule the date and add it to your calendar,
- decide on the session's type: a project's beginning, analysis, an ideation session, etc.
- create workshops' agenda, including their structure, timescale, and methods of work (teams, pairs, individual).

Helpful notes for this stage

- Treat the workshops like any other project – plan them as a full customer experience – from the first to the last interaction; keep the activities diverse (verbal, visual, manual), this will help you maintain good dynamic and the flow of the team's cooperation.
- Name your workshop session, then, in a subtitle, explain its character, for example: 'Senior citizens' communication – ideation session;' use this name in your calendars, but also in invitations, which you will create in Step 2.
- Do not plan daylong online sessions. The best sessions last 2 to 3 hours with breaks. If your workshops are longer, split them.
- During online design workshops, use a hybrid model of work, which interconnects individual work offline with online presentations of the results. The results can be then developed further by a team effort. That way, all members take bigger responsibility for their participation.
- Pay attention when you plan the work in subgroups – during offline workshops mixing the groups improves the dynamics, but in a remote environment it can cause logistic issues. Think whether the mixing causes more harm than good.

STEP 2 - PREPARATIONS

Having completed the workshops' agenda, you can start preparing materials and tools for work. This task often takes more time than the workshop itself. Make sure to establish contact with the participants already before the meeting. You can contact them by mail, offer to create a group on one of the popular communicators (Messenger, WhatsApp, Slack, or their likes). This way the communication channel will support you during the workshops – which is priceless, for example, in case of a lost connection on the main online tool you are using.

What must be done?

- choose the tools that will go well with your planned program: an application for videoconferences (Google Meet, Zoom, Microsoft Teams, Skype, etc.), a shared online board (Mural, Miro, Google Docs, etc.),
- prepare your work materials: a series of canvas inspired by the workshops' scenario and a presentation which will lead the way through the program for both you and the participants,
- enrich the workshops by using quiz-creating tools if you have planned a competition or some other sort of friendly rivalry (Kahoot, Brightful.me),
- prepare and send out mail invitations; they should include: workshops' title, dates, hours, goals, an agenda, the participants' list, dress code, links to your remote tools of choice, instructions on how to use them and a list of analog materials,
- prepare a backup / emergency plan in case one of the chosen tools fails.

Helpful notes for this stage

- While working remotely, use the participants' environment to your advantage – exploit their objects, colours, space, anything you can notice. You don't need to use digital tools for every activity.
- Make a deal with the workshops' participants to wear shirts in the same colour or pattern. This is a proven method to raise the spirit. You can raise the energy level by recommending clothes in bright, invigorating tones: orange, yellow or red. This is called dopamine dressing.
- Create two agendas: first – a brief one, for the invitations; second – much more detailed, for the leaders, with short tasks every 10–15 minutes.
- During this stage, come up with individual tasks for the participants to complete before the meeting, describe these tasks and send with the invitations. Understanding the workshops' context in advance boosts the effectiveness of remote work. An interesting idea is, for instance, creating a short film explaining the workshops and the tasks.
- While organising your first online workshops, plan them around maximum two tested digital tools. The more tools you use, the bigger the risk that something will go wrong.
- Base your digital tools' decision on the team you will be cooperating with. The way in which you pick these tools will affect the workshop's flow.
- Book more time for planning and preparation, which, in the case of online workshops, require much more effort and take even three times longer than in the case of face-to-face meetings.
- Test specific elements of the workshops: the time needed to complete each exercise, clarity of the instructions, especially if an exercise is new.

STEP 3 - FACILITATION

All the time-consuming preparations lead you to this moment – the workshops' execution. This stage is pure action: execution, research, and design work. Its smooth flow depends on both the meticulousness of your preparations and on your experience. It will be helpful if you are already in contact with the participants, who are more engaged thanks to the tasks you gave them before the workshops. As an organiser and host, begin the session half an hour before the scheduled start, so that no one needs to wait for you.

During the workshops, remember about the PERMA¹ model. With its origins in positive psychology, it will help you take care of the participants' well-being. Essentially, it consists of five important elements:

- Positive Emotions** – solidify positive emotions with praise, smiles and games,
- Engagement** – keep people engaged thanks to maintaining concentration and reducing distractors,
- Relationships** – relations are vital for successful cooperation, they can be solidified by rituals,
- Meaning** – the feeling of purpose surrounding the meeting which translates into personal input to exercises,
- Achievements** – celebrate achievements by creating a space for reflection and appreciation of others.

1. Seligman, M. E. P. (2011). *Flourish: A visionary new understanding of happiness and well-being*. Free Press.

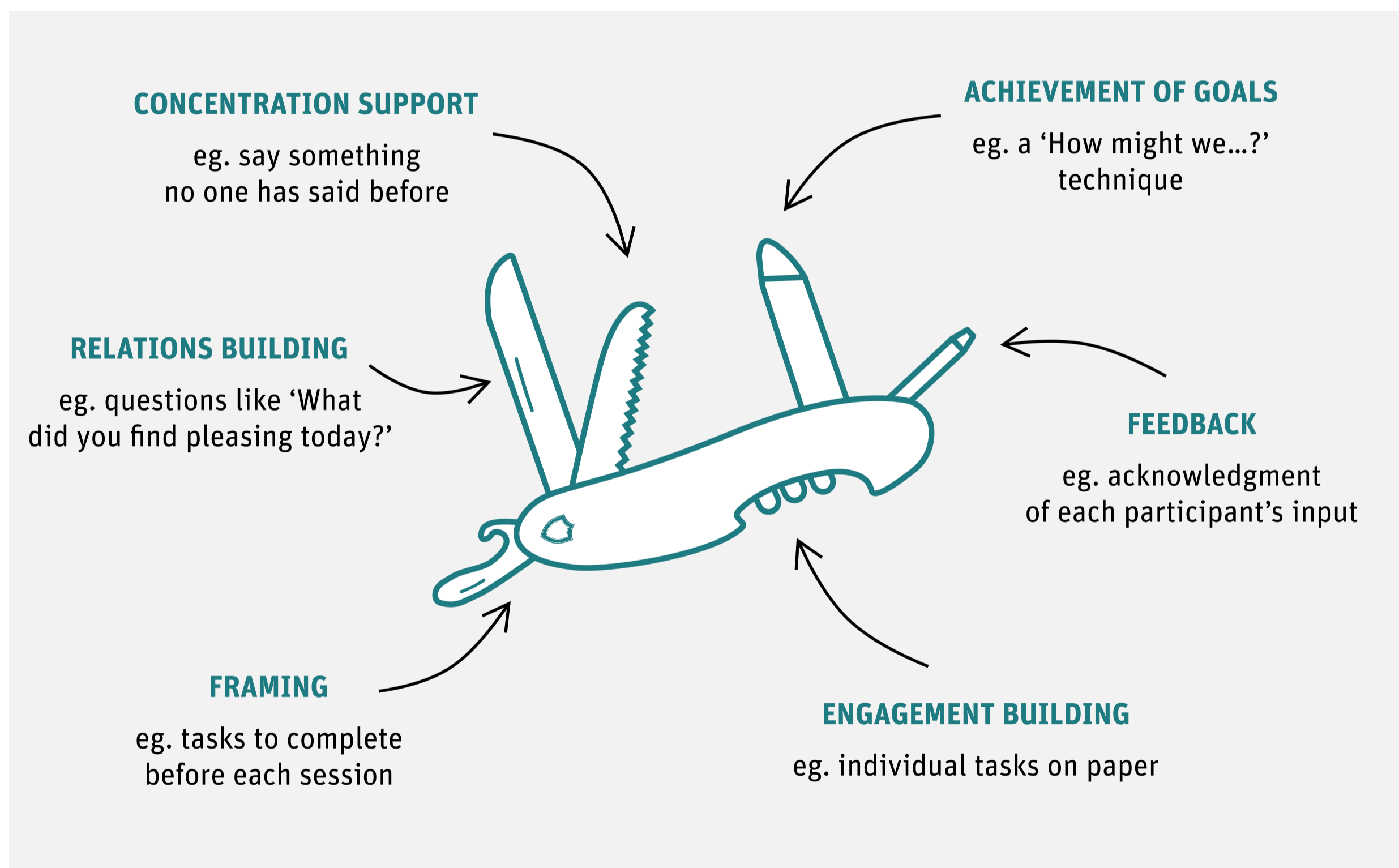
What must be done?

- make sure all people can hear each other well and there are no technical difficulties,
- at the beginning of the workshops, present and discuss the agenda and the rules of working online (including savoir vivre) – for example, ask the participants to turn on the cameras and to make sure everyone has the right display on their screens – so they can see the moderator, other members and displayed presentation simultaneously,
- between each exercise, provide a space for reflection and drawing conclusions – these are the moments during which the real value of the workshops is being created,
- stick to the ‘5 minutes’ rule, meaning ‘make sure every five minutes something new happens;’ it can be a new illustration, a new question or a film – this will help keeping the participants’ concentrated on the workshops.

Helpful notes for this stage

- Encourage people to use analog activities to the fullest; it is especially important in designers’ work since the so-called ‘hands thinking’ provides not only deeper engagement but also makes it possible to reach the subconscious knowledge, generate better ideas.
- In case of technical difficulties, switch to an alternative tool on which you have decided prior to the workshops.
- If you are using a new tool, plan the first exercise so that the participants can get used to the new environment.
- Check the lightning and the background visible for other participants. Pleasing backgrounds include: a bookcase, musical instruments, plants, or photograph wallpaper.
- Do not loose time on unnecessary discussions, ask the participants to use the parking, in which they can write down all issues to which they want to return.

- To create subgroups, you can use the breakout rooms function (available in Zoom, among others). That way, you can easily move people to several virtual rooms. At any moment, you can call them back into the shared room, aka the main session.
- If any individual work is done during the online session, prepare the right music, which you can turn on to fill in the silence (remember to check for the optimal sound settings in advance).
- End the meeting by celebrating your success; appreciate of the input each participant brought into the workshops; make a commemorative screenshot with everyone in it – you can later add it to a summary email.



STEP 4 - FOLLOW UP

Well-conducted workshops bring in tangible results. That is why it is a good practice to create and send out a summary and a word of thanks after each session. It is best to use the same method as in sending the invitations. Remember to do it no later than next day. In the message, recall the workshops' goals, the list of the participants, time you devoted for this cooperation; then, add the conclusions and results of your session together. Most of the materials used in online workshops are digital, which makes further work and sharing results easier after the workshops.

What must be done?

- draw up the results of your cooperation in a form which will allow everyone to use them easily – it can be a shared space on an (online) drive, a presentation; the team might want to continue working with virtual boards (Miro, Mural, etc.) in which case a link to the specified space will suffice,
- prepare and send out a message with words of thanks, the materials you used, the photos taken during the workshops, written down and elaborated conclusions, and next steps,
- ask the participants to complete a specified task after the workshops; this will prolong the interaction between them, especially if the session is a smaller part of a whole design project,
- make sure that both the conclusions and next steps are clear and understood by all participants; that they are well-aligned with their capabilities and skills.

Helpful notes for this stage

- Even if the workshops were a one-time session, try to **keep in touch with the participants** using a communicator (Messenger, WhatsApp, Slack, etc.) for at least few more days; use this time to nourish the relations between participants, get feedback, reflections, maybe even new ideas.
- Ask the participants to send over to you their conclusions, reflections, drawings.
- Carry out a survey (you can use Google Forms, Typeform, Survey Monkey, etc.) to **get some feedback** – ask, for example, for three best workshop elements and then for three elements that should be changed or improved in the future; if a next session is due with this team, you can use the survey tool to set a list of goals for the next workshops.
- Use the last five minutes of the workshops as a time for feedback (for example, in a form of a survey).

CONCLUSION

Online workshops are not so different from regular ones. The crucial part is still the cooperation. Remember, not everything can be predicted, even the best of plans can crumble under the impact of reality. Surprise, invention, and novelty are natural elements of design, it is good to keep an open mind. Effective design workshops hinge not only on good planning but also on the art of improvisation. What is important is that they lead to the intended result.

Good luck to everyone!

TOOLKIT AUTHORS



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DESIGN PROVISION is a company founded by Magda Kochanowska and Weronika Rochacka Gagliardi. The DESIGN PROVISION team consists of experts in the field of Service Design and innovation processes' management, as well as specialists in Design Research (research conducted for the design processes). So far, Magda and Weronika have cooperated with such clients as ING Bank (Poland, Netherlands, Germany), Mercer Services Polska, Znanylekarz.pl (Docplanner Group), Costa Coffee, Nationale Nederlanden, Santander Bank Polska, Millennium Bank or Centrum Komunikacji Społecznej Urzędu m.st. Warszawy.



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ISBN 978-1-943386-98-7

Published: 30.09.2020

Icons on the cards, which accompany the Toolkit, were created by Freepik on www.flaticon.com

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