

Case study – running a remote workshop

The brief

A Cambridge technology design company wanted to pivot and re-invent their business and asked me to design and facilitate a workshop. Normally, this would be delivered in person, but COVID-19 meant this was impossible. So, rather than delaying, we agreed to run a workshop with the team remotely.

In this new scenario, my brief was to:

- Replicate a live workshop environment
- Follow a structured approach to keep them on track
- Make it fast paced and ensure that the team were fully engaged throughout
- Encourage people to contribute effectively and often
- Provide small group activities
- Make it fun

Meeting software

Remote workshops were a new thing for me, so I spent a long time researching and testing software tools that suited the way I worked and which fulfilled the brief I had been given.

I chose Zoom® for the meeting platform as this provided everything I needed, particularly ease of use, breakout rooms, chat, hand raising etc.

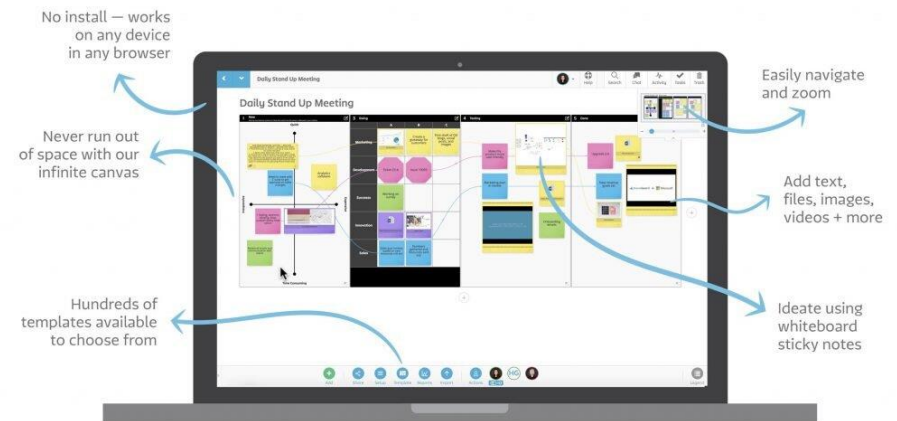


Picture 1: Zoom©

Workspace software

The software for facilitating the workshop was crucial. I wanted a single solution that enabled all the activities I do in live workshops without any clunky screen switching. I found Stormboard® which provided everything:

- Slide and video presentation
- Whiteboard writing for me and participants
- Canvasses for live sharing of files, ideas and getting team input
- Voting and prioritisation tools
- Easy and fast reporting of output created



Picture 2: Stormboard screenshot©

Preparing the workshop

As I always do, I prepared intensely but because it was a remote workshop, it required more than ever. In addition to the normal preparation of pre-work, materials, exercises and canvasses, it required precise testing and timing of every stage of the workshop to ensure it would work in a remote setting and was still fast paced, interactive and participative.

The outcome was a very detailed plan that was tested, tested and tested again until I felt I had the closest possible equivalent of a live workshop.

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The workshop

We decided to go for a half-day and this was the right thing to do. Any longer would have been too much. I kept presenting time down to the minimum and participation and collaboration time to the maximum. We used breakout rooms to split the team up into smaller groups and this worked really well.

Although it was tempting to replicate the live workshop method and allow free input to canvasses from all participants at the same time, it actually worked far better managing this through facilitation with one person coordinating the input in a controlled manner.

This didn't dampen collaboration or participation at all; it just meant it was managed and prevented uncontrolled conversations.

The software all held up and worked brilliantly and tools such as chat, voting and hands up were invaluable. The timings worked well and I ensured there were plenty of breaks throughout and encouraged people to get up and away from their desks.

All in all it was a joy to run and far less difficult than I first expected.

Reporting

At the end of the workshop, while everyone was still on line, we agreed what output they all wanted and once agreed, it took me five minutes to collate all the data and canvasses they had created and everything was sent to their inboxes immediately.

This was much easier than the reporting required in live workshops – a real plus for the remote working!

Testimonials

"I participated in an innovation workshop facilitated by Ludo last week, which we moved to Zoom instead of face to face. I was astonished to see that the interactions were probably just as efficient if not in some way more efficient than if done in person. Although I missed the direct contact with a fascinating and diverse group of fellow innovators, the outcome was impressive." **Dr. Daniel A. Kaute, ECO-Limited**

"I was really impressed both with the process and the ease with which the participants were able to interact freely. Ludo guides the process really skillfully and kept us making headway as we worked through various tasks. The virtual boards he uses to capture the process were easy to read and interact with and we came away with a really useful future business model and set of actions." **Justin Pisani, GWA**

"The outputs from our remote business planning workshop that you organised was as valuable and productive as if we had all been sitting in a room together. Thank you for helping me and my team develop and revise our business strategy at this critical time in a meaningful way" **William Averdiek, Barocal**

More information

If you would like more information or would like to discuss anything, please use one of the following:

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