

Tips for an Effective Innovation Lab



Planning, Executing, and Making the Most out of Your Workshop

From small half-day meetings with colleagues, to large multi-day international conferences with participants from diverse backgrounds, workshop-style events provide invaluable opportunities to cement personal relationships, open up forums for creative thinking and discussion, and set the stage for future collaboration.

This document provides tips to help organizers **plan, execute** and **follow-up** on their workshops so that they can make the most of these opportunities.

The time, effort and expense (even the carbon emissions from travel!) that workshops require make delivering on all three of these elements an important responsibility for organizers.

Why 'Innovation Lab'?

This guide outlines a participant-centered approach to workshop organization that aims to generate deep collaboration and innovative thinking on complex issues. It is aimed primarily at those running international workshops of an interdisciplinary nature, where communication between diverse perspectives is key. However, many of the tips included will be useful to those running events with a smaller scope and scale.

Organizers also want to save their own time and effort. This guide therefore includes simple tips and general advice for efficient workshop organization, presented in an easy to read format.

I. Planning

Inviting the right people, designing a sufficiently ambitious agenda, making your objectives clear and participants excited about the event ahead of time are all important parts of the planning process. By doing these things purposefully, you will set yourself up for success.

1. Invite Early

Getting the right people in the room is the most important part of planning any workshop. For international meetings requiring extensive travel, sending invites ~6 months in advance will significantly improve the positive response rate. Knowing who will be there in advance also allows more time for agenda planning that is tailored to participants.

2. Pick up the Phone

As a rule, aim to speak in person or over the phone at least once with each participant ahead of time. The earlier in the planning process, the better. A short phone call can save time as compared with email exchanges and creates a more personal connection.

3. Crowdsourcing Invitations

When you send invitations or talk to participants over the phone, ask them for suggestions for additional invitees. This is a great way to increase buy-in. And if someone is actively vouching for them these new invitees will probably be great contributors.

4. High-level Invites for Credibility

If there are one or two (or five) 'big name' people that you really want to have attend, invite them first, get their buy-in on objectives, and ask if you can put their names on further invitations. This will increase the positive response rate.

5. Solicit Bios with Expectations

Kickstart the 'getting to know each other' part by asking everyone to submit a short personal bio ahead of time. It should include their expectations or goals for the meeting, which will also help you to prepare an agenda that suits the group.

6. Friendly Correspondence

Set the tone for friendly and open discussion at the event through your correspondence with attendees ahead of time. Send at least one email in advance that is addressed to everyone and has a welcoming tone.

7. Convenience is Appreciated

Try to make preparations easy for participants. Try not to skimp on covering costs and send lots of helpful information beforehand about meeting logistics.

8. Responsive Agenda Design

Use what you know about your attendees to design an agenda that plays to their strengths in terms of content covered and session formats. Keep them in the loop and allow opportunities for input in advance.

9. No Death by PowerPoint

These tend to put people to sleep, especially if they are lengthy and in rapid succession. One keynote from a VIP and some short talks to get conversations started can be all that's required.

10. Variety in Session Types

Lots of options are available – world café, breakouts and presenting back, team debates, games, etc. Variety will keep people interested and engaged.

11. Free Time

Burnt out people generally don't make the best workshop participants. Expect sessions to go long and include lots of breaks in the agenda. This time is valuable for networking.

12. Plan a Fun Event

If you are planning an international workshop that will last longer than one day, try to include a fun afternoon activity or field trip. This allows further opportunity for personal connections to be made. Do it on the first day so that the comfort level rises on day two.

II. Execution

How participants feel during a workshop will significantly influence the quality of their contributions.

Make sure they are comfortable, clear on what they are supposed to be doing, and feel empowered to go above and beyond. Whatever your role, make sure to set an example for others to follow.

1. Be the Host

As an organizer, you may be the only person in the room that some participants already know. Make them comfortable. Treat the meeting room like your home and play the role of host.

2. Use a Facilitator

A facilitator acts as an emcee for the workshop. They try to get the most out of participants and should be keenly aware of meeting objectives. Whether or not you hire a professional, delegate it to a competent participant or do it yourself, it's important to have at least one person in the room playing the role of facilitator.

3. Flexible Mornings

There will always be a few latecomers, especially on day one as many participants haven't been to the venue before. Give people time to get settled in and chat amongst themselves when they arrive rather than starting early.

4. Clear Objectives

Objectives should be clearly and explicitly stated at the start and participants should have a chance to discuss them. This keeps people pulling in the same direction. A good objective is both ambitious and concrete.

5. Set Ground Rules

The goal of setting ground rules is not only to ensure respectful discussion but also equal opportunity to contribute. Participants should have a chance to comment on and add to ground rules at the start of the workshop.

6. Friendly Atmosphere

Workshops where participants feel like friends at the end are almost always the most worthwhile. The facilitator and other organizers should set an example by the way they treat their guests and each other.

7. Flexibility and Firmness

It is likely that in order to achieve your meeting objectives your agenda will need to be adapted on the fly. As an organizer you should allow things to evolve, but also know when to step in if they start to diverge too much from the plan.

8. Ample Time to Present Back

A common tactic is to break participants into small groups where they work together before presenting back to plenary. These presentations are key to generating rich discussion. A common mistake is not giving groups enough time to prepare and deliver them.

9. Open the Floor

Provide frequent opportunities for anyone to comment on what has been said or done so far. Open and respectful discussion can lead to new ideas and keeps everyone engaged and contributing.

10. Solicit Next Steps

Participants should have a sense of ownership over what happens next. Follow-up activities should be co-generated in the room to reflect the interests and ideas of those involved. Include a final plenary where next steps are discussed and everyone has a chance to contribute.

11. Notes and Pictures

Make sure to appoint a note-taker so that important outcomes are recorded. Pictures of the process can also be helpful down the road when reporting on the workshop.

12. File Sharing

Provide a platform for participants to share documents. This is particularly useful when they break into groups on different themes. 'Google Drive' is a flexible and free platform for file sharing that is simple to use.

III. Follow-up

This is where most workshops struggle, and for good reason.

Don't set the bar too high.

Sustained follow-up can only emerge where roles are clear and interests truly align. It cannot be forced, but there are things you can do to keep the ball rolling and collaborations intact.

1. Don't Delay

After running or participating in a workshop it's easy to spend weeks catching up on other things. As an organizer the most important part of follow-up is to keep the momentum going and show participants that you are committed to seeing things through. Follow-up on specific action items right away and consolidate notes and other outputs so that key insights don't get lost or forgotten.

2. Keep Track

A good workshop will generate all kinds of new ideas and collaborations, some of which will be tangential to its original purpose. Even if it's not something that you are directly involved in, try to keep track of all of the things that emerge. Asking everyone to send a short message around within one week of the workshop on what they learned and what they want to do next is a good way to start.

3. Share Calendars

An easy way to keep the group in touch with each other after the workshop is to create a shared calendar where participants can add relevant events that they will be attending. This way they know when opportunities to meet again will arise.

4. Be Realistic

Being ambitious is good, but only if your ambitions are achievable. Generally expect that what people promise to do in the room won't always get done. Put the emphasis of follow-up efforts on things that are near-term and achievable, and directly align with the interests of contributors.

5. Make Sure It's Novel

Some follow-up activities may seem like a great idea, but have been done before by others whose work participants are simply not aware of. As an organizer, a useful role you can play in supporting follow-up activities is in helping to situate the efforts of your colleagues within a wider context and help them to understand what's been done before and where new opportunities lay.

6. Workshop Report: Short, Simple, Soon

Workshop reports can take many different formats, and aren't always necessary. Tailor your report to its audience, and as a general rule try to keep it short enough that your target audience will read it and focus on a few key messages. The sooner you can get it out the door the fresher its findings will be, which helps attract readers.

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For further explanation and additional ideas please don't hesitate to reach out to npmoore@uwaterloo.ca

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