

The background of the cover features a photograph of a man in a dark suit and white shirt standing in a meeting room. He is gesturing with his right hand while looking towards the left. A whiteboard on an easel is visible to his right. In the foreground, the back of a person's head and shoulders is visible, sitting at a table. The image is overlaid with large, abstract geometric shapes in shades of blue and orange.

# A Business Analyst's Guide to Running a Virtual Workshop

## **Course Workbook**

contributed by Carl Sudholz

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# MODULE 1: Introduction to The Course

## Introduction

As a business analyst, knowing how to conduct good workshops is an essential skill. This is especially important in the BABOK Guide's Elicitation and Collaboration stage (Chapter 4), when we work with customers and stakeholders who are key to project success.

In 2020 in the wake of the Covid-19 global pandemic, the world has made a drastic shift to working remotely.

In this module, we will discuss the purpose of this course, and the alignment between virtual workshops and the IIBA BABOK Guide's Elicitation and Collaboration Knowledge Area.

### **By the end of this module, you should be able to:**

- Understand why virtual workshops are important to being a business analyst.
- Recognize the value of using virtual workshops as an effective delivery method for stakeholder elicitation.

## The Virtual Environment Requires A New Way of Working

As internet capabilities and technologies have become more sophisticated, the shift to working online has grown. Though the Covid-19 global pandemic hastened the trend towards remote work, it had already begun to rise in popularity. So, we can say with conviction that virtual workshops are here to stay.

In fact, any workshop that can be done face-to-face can be replicated online, for example:

- Interviews
- Training
- Team meetings
- Customer Journey Maps

Moving to a virtual environment gives us exciting new opportunities, but with any new practice or skill, there is a learning curve. This new way of working prompts the need to return to the profession's body of knowledge so that we can best utilize the virtual environment and platforms.

## Problem Statement

One question that business analysts, like you, keep asking is:

### **How do we run virtual workshops that are aligned with the IIBA BABOK Guide's Elicitation and Collaboration knowledge area?**

In this course, we will cover how to prepare, structure, and run effective virtual workshops for your customers and stakeholders, for example, through a customer journey workshop.

## Why This Course Is Important

- Facilitating virtual workshops is a key skillset for every business analyst.
- You will learn how to fulfill all the elements and tasks in the BABOK Guide’s Elicitation and Collaboration Knowledge Area using virtual workshops.
- Add to your professional development and certification.

This course will help you to evolve your skillset and professional capabilities, and give you a better chance of enhancing your project success and your overall career performance as a business analyst.

### **BABOK Guide Chapter 4: Elicitation and collaboration in a virtual environment**

Here is how the five steps of elicitation and collaboration (as outlined in the BABOK Guide) are practiced through virtual workshops:

| ELICITATION & COLLABORATION TASKS             | WHAT THIS MEANS IN A VIRTUAL ENVIRONMENT   |
|---|--|
| 4.1 Prepare for Elicitation                   | Being well prepared for your virtual workshop.   |
| 4.2 Conduct Elicitation                       | Facilitating the virtual workshop.   |
| 4.3 Confirm Elicitation Results               | Validating workshop discussions and outcomes against other sources of organizational data.                     |
| 4.4 Communicate Business Analysis Information | Effectively communicating key information and outcomes of the workshop with stakeholders.                      |
| 4.5 Manage Stakeholder Collaboration          | Consistently engaging with stakeholders to meet their needs/ expectations—before, during & after the workshop. |

## Specific Learning from This Course:

- Opportunities and challenges in a virtual environment – **Module 2**
- Preparing and planning for your virtual workshop – **Module 3**
- Running and facilitating your virtual workshop – **Module 4**
- Following up after your workshop – **Module 5**

## Learning Activity

1. How can you use virtual workshops in your current projects?
2. What are your biggest fears in running virtual workshops?
3. Which skills do you think will help you to run virtual workshops effectively?



## MODULE 2: Virtual Workshops – Opportunities & Challenges

### Introduction

You've had your fair share of virtual events in the last few months. It's clear that some of them work even better than real-life events, while some don't. Which one do you want yours to be like?

With the explosion of virtual events in the recent year, we have all experienced the benefits that they bring as well as the challenges. Luckily, with the right technology tools and facilitation techniques, we can overcome most of these challenges effectively and create productive and fulfilling experiences for our stakeholders and colleagues.

#### **By the end of this module, you should be able to:**

- Appreciate the differences in facilitating virtual vs face-to-face workshops.
- Recognize the value of using virtual workshops as an effective delivery method to face-to-face stakeholder elicitation.
- Brainstorm opportunities for using virtual workshops to deliver upon the elicitation and collaboration components of the BABOK Guide.
- Determine how to use virtual workshops to fulfill the tasks and goals of the BABOK Guide's Elicitation and Collaboration Knowledge Area.

### The Core Purpose of Virtual Workshops

Virtual workshops are a core method of business analysis, and specifically, aid in knowing your stakeholders. They are essential for connecting communities:

- bringing people together,
- solving problems and enabling change (organizational and global), and
- finding new and better ways of delivering solutions.

With the virtual environment and digital technology, we can cross boundaries of location and culture.

However, running virtual workshops require a new way of working.

### What Makes Virtual Workshops So Useful?

- Most in-person activities and tasks can be replicated in the virtual environment.
- We can bring people together, no matter where they are – there are no geographical limitations.
- As a result, virtual workshops can lead to:
  - › Reduced costs - Less expensive as no venue rental fees, or travel and transportation logistics to pay for.
  - › Inclusion, accessibility, and new experiences – anyone can attend, attendance isn't restricted e.g., long travel, budgetary constraints, geographical distance, and family responsibilities. You can have people from different teams, organizations, and even countries participate.

- › Improved productivity and reduced administration – less time wasted on in-person delays, (e.g., getting to the venue; moving to breakout sessions), or collating feedback from discussions as virtual workshops and sessions can be recorded and data stored easily.
- › New tools for engagement and participation – all attendees can get their turn to speak and participate, and virtual collaboration tools such as whiteboards and breakout rooms provide the space and structure to brainstorm, ideate and discuss. Conversations will happen in pre-decided spaces, like within the main meeting or a breakout room—making them easier to manage and record the sessions or main points.

## What Makes Virtual Workshops Challenging?

- Face-to-face interactions are more natural than online. Trying to interact virtually can seem awkward at times, as the natural synergy and energy that exists when people meet and connect face to face can never be replicated online.
- Technology adds complexity. The inclusion of technology coupled with the removal of face-to-face interactions add a layer of complexity that we're not always sure how to navigate. For example:
  - › Everyone needs to have tools for virtual engagement e.g., apps, microphone, video.
  - › Everyone needs to know how to use these devices and virtual programs.
  - › It's easy for people to be distracted by their environment and devices, as we're often joining in from home.
  - › Internet connections can be unstable or devices can malfunction.
  - › It is difficult for the facilitator/meeting host to 'read the room' and observe the energy levels and focus of the participants in a virtual setting.

There is good news! With some thought and creativity, we can turn these differences into benefits. Having run and attended so many virtual sessions, we know what works and how to prepare for it, so that our virtual workshops are both effective and enjoyable.

We can use good facilitation techniques to work-around and avoid some of the common pitfalls when people participate virtually. We will discuss this more in **Modules 3 & 4**.

In addition, we can use digital tools to enhance communication and participation in the virtual environment, and that's exactly what we're going to be looking at next.





## MODULE 3: Preparing Your Virtual Workshop

### Introduction

The success of your virtual workshop depends upon your preparation. So, how do you ensure you are well-prepared when it's time to go live?

Preparation is the first task of the BABOK Guide's Elicitation & Collaboration Knowledge Area. A virtual workshop actually requires more preparation than a regular one, because of the additional complexity of technology and absence of face-to-face interaction.

Therefore, good preparation is critical to the success of your workshop. For the organizer or facilitator, this requires significant time, effort, and communication before the actual event. In this module, we'll discuss some of the key elements you need to be aware of and prepare for before you run your first virtual workshop.

#### **By the end of this module, you should be able to:**

- Articulate the key purpose of your virtual workshop.
- Identify the elements of preparation required to run a good virtual workshop.
- Become familiar with good virtual workshop protocols and standards.
- Create a plan and agenda for the virtual workshop.

### What Does 'Preparation' Mean, According to The BABOK Guide?

The preparation activities we are about to discuss correspond directly with the first phase of Elicitation and Collaboration in the BABOK Guide – 4.1 Prepare for Elicitation:

- 4.1.4.1 – Understand the Scope of Elicitation
- 4.1.4.2 – Select Elicitation Techniques
- 4.1.4.3 – Set Up Logistics
- 4.1.4.4 – Secure Supporting Material
- 4.1.4.5 – Prepare Stakeholders

This stage involves being clear on the outcomes that the workshop is intended to achieve and ensuring that the workshop participants are well-acquainted with these outcomes, and the format and activities that will be utilized.

### Discovering The 'Why' Of Your Virtual Workshop

#### **BABOK Guide Reference: 4.1.4.1 Understand the Scope**

This essential step precedes all preparation and planning: **identifying the purpose of your workshop and articulating it clearly to your participants.**

One way to do this is by envisioning your ideal outcome. What are the ideal results from this workshop? The answer to this will determine the scope, or what needs to happen during the workshop to enable those outcomes to occur.

It's not a good idea to try to get too much done in one workshop; it is better to focus on one major outcome. You should also be able to write this outcome concisely, in one sentence.

The key purpose of any elicitation and collaboration activity is to gain consensus. In a customer journey mapping workshop, for example, the purpose is to understand and empathize with the experience of customers as they move through various touchpoints to do business with us.

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**A word of caution:** *If you're not able to determine the purpose of your workshop, then you're not ready to run it. However, once you're clear about the purpose of the workshop, it's a good idea to keep returning to the purpose while you plan activities and even while you're conducting the workshop.*

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## Describe Your Workshop Purpose

Complete the following sentence to articulate your purpose statement:

**The purpose of this virtual workshop is to help us do:**

\_\_\_\_\_ for \_\_\_\_\_.

(WHAT) (WHO)

For example:

The purpose of this customer journey mapping workshop is to help us understand **the journey, experience, decisions and feelings** ('what') of **our customers** ('who') as they engage with our products or services.

## Creating A Virtual Workshop Plan

**BABOK Guide Reference: 4.1.4.2 Select Techniques**

For every workshop that you run, you need to create a session plan. So, the next step is to build out the overall workshop plan using the purpose (determined above) as the anchor. A clear plan will enable you, before the workshop, to outline and organize the workshop activities, and effectively lead people through them during the actual session.

Before creating the plan, you will need to consider the following:

- 'Who' – workshop participants
  - › Who needs to be there?
  - › How many people need to attend?
- 'What' – output and activities
  - › What output do you need from the workshop?
  - › What activities need to be run in order to achieve that output?
- 'When' – timing and duration
  - › Based on the activities, how much time do you need for the workshop?
  - › Which time zones will your attendees be joining from?
  - › How will this affect the meeting time and duration?
  - › What time do you need to start and end? Beware of time zones of participants.

- ‘Where’ – Which platform will you be using to run the workshop? All the previous questions and answers will help you to determine the most suitable one.
- Pre-workshop activities: It’s a good idea to review your activities and tools and ask yourself: what can be done before the workshop to minimize delays and conserve precious meeting time? You can send out a reasonable amount of pre-workshop activities for participants to complete before the actual workshop, e.g., completing a questionnaire, contributing to a shared document, etc.
- Post-workshop activities: It’s also important to identify the key stakeholders that you need to communicate with after the workshop, and what information you will need to send them. It’s also useful to set dates by which you will share workshop outcomes.

## A Session Plan Will Typically Look Like:

| TIME | SESSION                 | ACTIVITY   | RESOURCES                   | OUTCOMES  |
|------|-------------------------|--|-----------------------------|---|
| 0:00 | Begin and welcome       | Whole of group chat. Check in sound & video                          | Online platform             | Welcome everyone to the call.                                 |
| 0:02 | Introduction and agenda | Participant introductions. Ice Breaker?                              | Workshop agenda             | Confirm everyone has been able to log into the online tools.  |
| 0:05 | Who is the customer?    | Whole of group walk through of the customer persona for this journey | Customer Profile or persona | Establish group focus & understand with the persona in focus. |

It details what you will do through the workshop, down to the minute:

- **Time:** Minutes per activity
- **Session:** Name of agenda item
- **Activity:** What you will do, with whom
- **Resources:** What you need to do it
- **Outcome:** Why this is important

Thinking with the end in mind sets you up for success during and after the workshop.

## Designing the Workshop Agenda

**BABOK Guide Reference: 4.1.4.3 Setup Logistics**

You will need to create an agenda, directly from your workshop session plan. Here, you will layout the logistics required for the smooth running of your activities and workshop.

## Setting Up for Success

**BABOK Guide Reference: 4.1.4.4 Supporting Materials, 4.1.4.5 Prepare Stakeholders**

The key elements to factor in when you're preparing for a virtual workshop are:

- Tech and tools
- Participants
- Facilitator(s)

## Tech and Tools Requirements

The must-have tech and tools for everyone attending the virtual workshop include:

- A stable high speed broadband internet connection – this will affect everything else.
- Internet-enabled device – whether it is a computer, tablet, or mobile phone.
- Webcam with high-quality video.
- Microphone with high-quality audio, and headphones/headset.
- Access to a video-conferencing platform, such as Zoom or Teams.
- Workshop and/or project software.

**About the digital platform you use:** It is important to ensure that the virtual platform you use can be accessed by all participants. Sometimes there are company policies that block particular platforms, and you will need to use another. Failure to take care of this before the workshop is risky and can result in delays or even cause rescheduling.

## Getting Your Workshop Participants Ready

You can take specific measures to enable your workshop participants come to the session better prepared:

- **Familiarizing participants with tech and tools** - This is one element that is unique to running a virtual workshop. Every single participant needs to know how to use the digital platform and special tech tools that you plan to use. They need to know how to sign in, connect their mic, and turn their webcam on – so workshop time isn't wasted.
  - › Share a document containing a quick guide to the tools they can expect to use during the workshop. Do attendees have to download anything or create accounts? Include this information and make the requirements clear.
  - › If you plan to use any special tools like Miro, each participant needs to sign up to use the tool and know how to use the basic functionality.
  - › It is the participant's responsibility to ensure that they review this guide to prepare themselves.
- **Pre-Workshop Information & Activities** - A pre-workshop activity is a great way to super-charge your participants' focus and energy, and encourage their participation and collaboration during the session.
  - › Your participants should receive an informational email from you that tells them which digital platform and tools you'll be using. A quick written or video guide to the platform and tools is extremely helpful.
  - › Keep it short, but informative enough that no one shows up without a basic orientation of what they can expect.

## Preparing to Facilitate Your Virtual Workshop

- **Good Audio & Video Practices**

- › Place the camera on top of your computer screen so that it's at your eye level or just above.
- › It is important to also have the participants use their camera effectively. Looking at people's faces keeps Zoom fatigue at a minimum and has a huge impact on the way that participants will connect and communicate during the workshop.
- › Guide participants on adjusting their webcams if necessary.
- › Have good lighting that illuminates your face; don't have a window behind you.

- **Setting up your space & equipment**

- › There should be no background noise or distractions.
- › Experiment with your audio, video, and lighting.
- › Record yourself to test the audio and video quality.

- **Developing expertise with your digital tool**

- › Your participants will look to you for guidance and leadership in using the digital platform and tools during the workshop. PRACTICE before you go live so you will be able to keep your mind on running the session and less on learning the tech as you go.

- **Speaking and engaging with your audience**

- › Although facilitating a workshop is not a performance, you do want to be well-practiced in the way that you engage with participants and give instructions. Practice makes perfect!
- › Record yourself speaking while looking into the camera and observe how clear and concise you are while giving instructions.
- › Be authentic and bring your spirit to this virtual experience. This will help you to connect with your participants and help them to connect with you and the other participants.

- **Onboarding a co-facilitator**

- › Delivering or facilitating an online workshop while also managing tools and chat channels can make time management difficult. It's a good idea to get a co-facilitator who can engage with the technical elements of the virtual workshop, such as the messaging, breakout rooms, digital tools, and troubleshooting any tech issues that arise.
- › With a co-facilitator you can focus on the participants and maintain the energy levels and collaboration that you're aspiring towards.
- › Practice with your co-facilitator and be clear on your role and functions for this specific session.

## Digital Tools to Win At Virtual Workshops

It is tempting to want to wow your attendees with fancy technology, but that isn't the workshop's goal. Technology should work to achieve the aims that you have designed for your workshop and enable the workshop participants to have a good experience.

Digital tools include:

- Video meetings and webinars
- Digital whiteboards
- File sharing and co-authoring
- Business mapping
- Resource management/file sharing
- Project management

Technology should work to achieve the aims of your workshop and enhance the participants' experience. If you're satisfied with the tools you're using right now, there's no need to move to other platforms just because yours seem too simple or basic.

The more important question is: do they meet your virtual workshop needs? If yes, there's no need to look further. When they feel restrictive, that's when you'll need to start branching out.

## Setting Up Your Virtual Office

A well setup workspace is critical to success when hosting a virtual workshop. For this you need a quiet space with the right equipment, setup in the correct way.

### A quiet space

To host a successful workshop, you need to be working from a place that is free from background noise and distractions. Anything that takes the attention of your participants away from you and what you're saying or doing, will harm the workshop outcomes. A dedicated home office or meeting room is ideal.

### The right equipment

To host your online workshop, you will need:

- A fast and reliable internet connection.
- A modern personal computer or laptop.
- A hands-free microphone or headset.
- A high-definition webcam (at least 720p).
- A light source to make you look good.

You will want to set up your desk and equipment to suit you.

### Tips:

- Set your webcam level with your eyeline so that you are looking into the camera, as you are looking into someone's eyes. As a rule, the top of the webcam should be level with your eyebrows.
- Make sure your face is lit by a light source that is from behind the camera. That way, the light will bounce from your face, into the camera allowing people to see you clearly.
- To provide the best quality audio, your microphone should be close to your mouth. It doesn't matter if the microphone is seen in the video shot.

## Setting Up Your Space for Hosting A Virtual Workshop

When you set up your workspace for the online environment, it means that people can see and hear you as if you were in the same room.



## Learning Activity

1. How well is your workspace set up for video conferencing?
2. Do you know how to use all of the tools and platforms to their fullest capacity?

## Take Action

1. Run through your workshop plans with a friend, colleague or mentor.
2. Get in touch with your local IIBA Chapter and get involved in what they are doing. Ask for advice about running workshops or join a mentoring program.





## MODULE 4: Running Your Virtual Workshop

### Introduction

How can you look and sound professional on screen, especially for your first time running a virtual workshop? Wondering what to do so that your participants leave the workshop happy and satisfied?

In this module, we get into the basics of running a virtual workshop and share standards and practices for effective facilitation. We discuss ground rules for good virtual workshops, and provide tips for keeping your audience engaged and involved.

**By the end of this module, you should be able to:**

- Become familiar with good virtual workshop protocols and standards.

### What Does ‘Running the Workshop’ Mean, According To The BABOK Guide?

This stage corresponds directly with the second phase of Elicitation and Collaboration in the BABOK Guide – 4.2 Conduct Elicitation:

- 4.2.4.1 – Guide Elicitation Activity
- 4.2.4.2 – Capture Elicitation Outcomes

This phase involves you, as the facilitator, leading the workshop towards the destination that you’ve chosen, and recording the key outcomes of the session.



## Facilitating the Virtual Workshop

### Babok Guide Reference: 4.2.4.1 Guide Elicitation Activity

- **Before the workshop:**
  - › Show up early and get your tools ready – 30-60 minutes before the event. Load your slides and open up the digital tools that you plan to use during the session.
  - › Do audio and video checks.
  - › Look the part, be professional – this is essential to establishing your leadership during the session. Turn up with as much energy as you can, as your energy will lift everyone else's.
- **During the workshop:**
  - › Welcome participants and conduct ice-breaker activities. For ice-breaker ideas, refer to the handout that comes with this course.
  - › Inform people what they should do if there are any issues during the workshop, e.g., send you or your co-facilitator a private message.
  - › Follow the workshop agenda.
- **Timekeeping:**
  - › Stick to time! This keeps the activities and overall workshop running smoothly and effectively.
  - › Keep things moving at the right pace.
  - › Stay on track with your plan.
  - › Park distractions and derailing conversations.

## Keeping Participants Engaged During the Virtual Workshop

As the facilitator it's up to you to be able to engage people and take them along the journey. Fortunately, this doesn't require you to speak all the time. Rather, you are the conduit to get the best out of your attendees by encouraging them to share their thoughts and collaborate.

Focus on humans rather than technology: put yourself in the participants' shoes; what can you do/ say to make them feel involved and engaged?

Practical tips include:

- Constantly invite audience participation:
  - › set polls,
  - › ask people if they agree with points,
  - › keep the audience on their toes and involved, and
  - › ask for thumbs up and head nods.
- Call on people by name.
- Check in with people via chat or breakout rooms.
- Mix it up with silence, tone, and pace.
- Ask questions, lots of questions.
- Plan a diversity of activities.
- Be natural and have fun!

It can be difficult to ensure that people are engaged without body language and physical cues that you would look for in a regular, face-to-face environment. This is where your co-facilitator can be useful, especially in groups of more than 10.

If you find someone not contributing or who seems distracted, you or the other facilitator can message a participant in the private chat to check in and ensure that they are clear on what they should be doing or find out if there are any issues.

A secret in facilitating virtual workshops is to be comfortable with silence. If you ask a question and no one responds, there can be a number of reasons for this, e.g., participants may be nervous about going first, or perhaps their mic is on mute even when they are speaking. You can ask the question again and invite specific people to answer until the conversation gets going.

## Establish Ground Rules

### **BABOK Guide Reference: 4.2.4.1 Guide Elicitation Activity**

These are the rules of engagement to guide everyone participating in the virtual workshop. You want everyone to agree to these and commit to them. Practicing these ground rules is good virtual workshop etiquette and contributes to making the session run smoothly and effectively.

Ground rules include:

- Start recording the workshop – It is a good practice to let everyone know that the session is being recorded.
- Webcams ON when speaking – This helps you monitor participants' engagement and focus. Also, when people know they are being seen, they are likely to be more aware of themselves and act with more accountability. Keeping video on is non-negotiable for all participants.
- Mics on mute, unless speaking – This is important because of background noise or static and people are working from home, otherwise it can cause delays or distractions.
- Speaking one at a time, through the facilitator/chairperson/moderator.
- Encourage use of chat tools.
- 'Raise your hand' before speaking.
- Keep distractions to a minimum – Turn other devices on silent mode/switch off, and refrain from using social media or any non-workshop activities during the session.
- Stick to the time allocated for activities.
- Acknowledgement of country, time zones or other inclusive rituals, as appropriate.

## Recording and Capturing The Results

### Babok Guide Reference: 4.2.4.2 Capture Elicitation Outcomes

The advantage of using digital platforms and tools is that the proceedings and participants' inputs can be recorded with the click of a button.

- Your digital whiteboard is your best friend!
- Record session using digital platform.
- Use meeting transcript to fill in gaps:
  - › If you're using Zoom, select the audio transcription function before the meeting, and download the recording of the workshop once it's complete.
  - › If the transcription function is not available on the platform, you can use another online tool such as Rev or Temi.
  - › If you've used a digital tool, such as Miro, you can also save the notes that participants have added.
- **Consolidate key points and outcomes into a summary document:**
  - › Create an artefact that becomes a formal record of the workshop proceedings.
  - › Create this reference file by extracting the most important points and outcomes that your stakeholders will need and find useful. Create a slide presentation or document.
  - › It is also easy to reference and this ensures that there is continuity between the workshop and the rest of the project activities.

## Tips for Looking and Sounding Professional On Screen

To look and sound like a virtual workshop pro:

- Look the part – dress appropriately for facilitating a workshop (not necessarily formal attire).
- Do an audio check – make sure that you can hear and that others can hear you.
- Do a video check – frame yourself properly on your screen; not too far away, not too close; your head and shoulders should be in the shot; look directly at the camera when you're speaking, this will help to keep your participants engaged.
- Communicate effectively as a facilitator – Speak clearly and slowly so that everyone can hear and understand you.
  - › This is especially important if you have participants from other countries who are accustomed to different accents or whose first language isn't English.
  - › Send someone a private chat message if they can't be understood clearly (e.g., speaking too fast or because of their accent).
  - › Encourage people to send you a private chat message if they're having trouble hearing or understanding you.
  - › Repeat instructions as necessary, even if you have them displayed on a slide.

## Learning Activity

1. Which elements of facilitation are you good at?
2. Which skills do you need to develop further?
3. What additional support do you need and how can you get it?

## Take Action

1. Seek out ways to fill these gaps.



## MODULE 5: Following Up – After Your Virtual Workshop

### Introduction

What can you do to maintain engagement with your customers and stakeholders and have workshop outcomes get factored into project activities, once the workshop is over?

Your workshop may be complete, but your work isn't done - just yet! Here, we talk about the follow-up you need to do so that your efforts result in the outcomes you're aiming to achieve including maintaining good stakeholder relations.

#### **By the end of this module, you should be able to:**

- Increase customer & stakeholder engagement by taking steps to align workshop outcomes with project activities.

### What Does 'Confirm Results' Mean, According to the BABOK Guide?

These tasks correspond with BABOK Guide 4.3 – Confirm Elicitation Results

- 4.3.4.1 – Compare elicitation results against source information
- 4.3.4.2 – Compare elicitation results against other elicitation results

This includes comparing and contrasting your workshop results with equivalent sources of information to identify similarities and gaps.

### Comparing What We Say, Think & Do

- Other information sources – These include artefacts or documentation that enable you to compare and contrast what you've learnt in the workshop with how you're meant to do things in your organization or industry:
  - › Organization strategy and policy
  - › Standard operating procedures
  - › Internet resources
  - › Conference presentations
  - › Case studies
- Other elicitation results – Include feedback and information from other key individuals who have not participated in the workshops:
  - › Individual interviews
  - › Project leadership committees
  - › User feedback surveys
- Look for similarities, differences, and gaps.

Confirming results is not about determining right or wrong, but rather confirming the results against the risks of delivery. Gaps and similarities are exposed in the comparison between the workshop results and these additional sources of information.

## What Does ‘Communicate Results’ Mean, According to The BABOK Guide?

These tasks correspond with BABOK Guide 4.4 – Communicate BA Information

- 4.4.4.1 – Determine Objectives and Format of Communication
- 4.4.4.2 – Communicate BA Package.

Much of this information will come from your Communications Plan. It influences the communication activities in the follow-up stage and the entire lifecycle of elicitation and collaboration.

Who do you need to communicate with? In addition to the workshop participants, there are other project stakeholders who will need to be kept up-to-date with the workshop outcomes and results, including those who:

- Will provide resources, skills, or talent.
- Are part of the approval chain, and their sign off is needed.

## Turn Your Workshop Results Into Project Outcomes

- All workshop participants want to be heard –The best way to ensure this is to list their comments and feedback into the final document.
- Package the results into a “final report” – This summarizes and consolidates the lessons that can be put into practice after the workshop.
- Share and ask for feedback with all participants – Asking for feedback continues after the workshop, and into the ongoing process of stakeholder engagement.
- Put these lessons into practice! By packaging these results and communicating with stakeholders will enable you to turn workshop results into project outcomes.

## What Does ‘Stakeholder Collaboration’ Mean, According To The BABOK Guide?

These tasks correspond with BABOK Guide G4.5 – Manage Stakeholder Collaboration:

- 4.5.4.1 – Gain Agreement on Commitments
- 4.5.4.2 – Monitor Stakeholder Engagement
- 4.5.4.3 – Collaboration

This involves agreeing on commitments, such as the project plan, participants and stakeholders, digital tools for the workshop. It is also about monitoring how well we’re sticking to the plan, and valuing the inputs of everyone to ensure collaboration and commitment.

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**Note:** *Gaining agreement is not the same as getting permission; you need to ensure that everyone is well-informed and on the same page.*

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## Learning Activity

1. What information will your stakeholders need from you once the workshop is over?
2. How might you communicate this information effectively?
3. How will your results impact your stakeholder relations and engagement beyond your project?

