

# Facilitation Guide – Online Workshops

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## Design Thinking for Student Projects

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### Notes:

The guide accompanies the textbook **Design Thinking for Student Projects**

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The latest version of the guide is stored on our website:

<https://study.sagepub.com/designthinking>

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## **Introduction and Context**

### *Who is the facilitation guide for?*

This document accompanies the textbook *‘Design Thinking for Student Projects’*. Whereas the book is aimed at students, many of the accompanying online resources are written for academics and others seeking to develop or improve modules, training courses and other activities focused on one or more of the following areas:

- Team-based projects
- Design Thinking and associated techniques
- Development of innovative solutions to address real-world challenges
- Development of key employability skills

The facilitation guide can also be used by students and others working independently who wish to facilitate online innovation workshops using Design Thinking and related techniques.

### *What does the guide contain?*

The guide contains the following:

- Advice on online tools, logistics and materials
- Advice and instructions for planning and running online workshops using Design Thinking and related techniques, including management of multiple parallel workshops
- A worked example based upon an Idea Generation workshop
- Hints and tips for facilitators
- Hints and tips for workshop attendees

## **Online Tools, Logistics and Materials**

### *People, process, technology*

All successful workshops are based upon a combination of people, process and technology.

The people are the facilitators and the workshop attendees or participants.

The process followed depends on the technique(s) being used. For example, we often make use of specific Design Thinking techniques.

The technology used for in-person workshops in a physical room or space is simple, so simple in fact we probably don't even think of it as being technology. As detailed in the accompanying Facilitation Guide for In-person Workshops, the 'technology' or materials typically includes wall space, flip charts, sticky notes, 'Sharpie'-style pens and marker pens.

For online workshops, we replace these physical elements with digital tools. Typically, we combine two different tools.

### *Video conferencing tool*

In recent years, most of us have become used to using tools like Zoom, Microsoft Teams, Google Hangouts and others for video conferencing. We often use these tools for meetings, teaching and learning and even socially distanced get togethers.

For online workshops, we use one of these tools for **video and audio-conferencing**. When selecting which tool to use, we are sometimes admittedly constrained by institutional and organisational standards and tools. The good news is that the different tools generally offer similar capabilities and features, although some may be more intuitive to use, and offer a better user experience, than others.

Unless running a small single team workshop, with no need for working in groups, the one extra capability we need from our selected video and audio collaboration tool is the ability to (easily) create and make use of **breakout rooms**. This is particularly important for Design Thinking-based techniques, where we generally run ‘diverge’ activities in the main virtual room and use breakout rooms to divide the room into smaller groups, enabling smaller team-based working and discussions during ‘converge’ activities.

The authors tend to use the Zoom platform for facilitating online Design Thinking and related workshops and have found the Zoom breakout room functionality generally works very well. You may have similar experiences using other tools.

A useful way of looking at this tooling is to compare in-room and online workshops. In an online workshop, the video conferencing tool provides us with the virtual (rather than physical) room we meet in, and the breakout capability provides the virtual tables the teams will work at.

### *Digital collaboration tool*

The second tool we need for an online workshop is a visual **digital collaboration tool**. This provides us with the walls, flip charts, sticky notes and pens we use in a room, along with the ability to individually and collaboratively make use of these items.

Again, multiple solutions are available for this purpose. At the time of writing, the two leading toolsets on the market appear to be MURAL and Miro, although other tools, of course, also exist.

When considering which tool to use, the following ‘requirements’ would be in our starter list for what is needed:

- The ability to create templates (and ideally reuse and/or configure pre-created templates) for each workshop activity.
- The ability to combine multiple activity templates into a single large virtual wall-based template.
- The ability to create a virtual wall for each team and/or project, by replicating a virtual wall-based template.
- The ability to (easily) provide and control user access to individual virtual walls.
- The ability to meet any wider specific security and access requirements of your institution or organisation.
- Intuitive browser and/or app-based access for project team members and/or workshop attendees to their assigned virtual wall(s).
- The ability for project team members and/or workshop attendees to (easily) access, view and populate workshop activities and visually collaborate with their teammates.
- The ability for module and course leaders and other academics and trainers to move between and view multiple virtual walls, while reviewing progress and/or facilitating workshop activities.
- Additional non-functional (e.g., number of users, number of parallel users, service availability, ability to create backup copies of virtual walls and so on) and commercial requirements (licencing details, one-off and ongoing costs etc.) also need to be taken into account.

For the purposes of the remainder of this document, we've assumed you have access to a suitable video conferencing tool and a visual digital collaboration tool.

### **Digital collaboration tool practice and project templates**

One of the risks of using any tool in a workshop is that much of the workshop may get taken up by people learning to use the tool and asking questions about how the tool works, rather than focusing on the primary subject matter and workshop activities.

When we first introduce a group to online workshops, they're usually familiar with video conferencing tools, but many attendees may never have used a digital collaboration tool before.

To address this challenge, before we plan to first use a digital collaboration tool with a group, we mandate the attendees beforehand undertake a short practice exercise to become familiar with the tool.

To assist, we use a pre-configured 'Practice Exercise' wall template in MURAL and use this to create a 'Practice Exercise' wall for each new group. The wall includes a template for three activities:

- Introductions – invited participants are provided with instructions to access the wall and navigate around the areas of the wall, learning to zoom in and out etc. They are then instructed to create a sticky note, enter their name and add a few interesting facts about themselves as an introduction.
- Hopes and Fears – participants are provided with instructions to carry out the diverge aspect of the Design Thinking Hopes and Fears activity. They create sticky notes which indicate their hopes and aspirations for the workshop, project or module, along with their fears and concerns. These are then used to populate the Hopes and Fears template on the virtual wall. This helps participants learn how to use MURAL and creates great intelligence for the facilitators and/or teaching staff, as the output from the activity can be used to understand the participants and generate empathy for them.
- Practice Area – participants are instructed how to use some of the tool's wider capabilities and given free range to have a play and create any content they wish to in the freeform practice area.

While one or two people may skip this practice, our experience shows that most people do engage with it and, by the time of the workshop, they are sufficiently familiar with the tool to make a fast start during the workshop.

To give you your own fast start, as part of the additional online resources for instructors, we've included a document called 'Digital Collaboration Tool Practice Instructions'. This provides a template for an introduction and practice exercise. The instructions are based upon the MURAL tool but can very easily be configured to use with Miro or any other tool. The document points to a MURAL practice wall template, which you can use to create and configure your own practice wall.

Here's a direct link to the **practice MURAL template**:

<https://app.mural.co/template/9b884ba4-7dcf-4ae5-adf7-2beed9a66391/3adba102-fe71-4ed0-8326-97540190001a>

We have also created a starter MURAL wall template for undertaking a project based upon the Design Thinking exercises used in the book. We recommend reusing this and/or your own templates to create a pre-configured collaboration area or wall (using your chosen digital collaboration tool) for each team to use, prior to the workshop, course, module or project. Each team wall should be populated with the activity templates for the specific individual activities you plan to facilitate.

Our starter MURAL wall includes a number of empty white space areas. These can be used as required for additional team working and notes. The wall also contains a number of duplicated areas for some activities. For example, two End-User Personas have been included. This is to enable students to undertake selected activities multiple times.

Here's a direct link to the **project MURAL template**:

<https://app.mural.co/template/520b30c0-146c-441d-ba43-752de8c50f62/99a40404-3885-4d63-bf33-3975ed423338>

Lastly, we have created an example of a populated MURAL wall. This includes many of the Design Thinking and related activity example images used in the book.

Here's a direct link to the **populated wall for an example project**:

<https://app.mural.co/t/leedsinnovation9948/m/leedsinnovation9948/1627556087609/6fd8f746ba8f21621ea0ec332c965309c29acbbc>

## *Workshop materials*

Great, you've got the technology and the attendees have had a practice. What else do you need for a successful online workshop?

### **For each workshop attendee**

- A laptop, tablet or similar device – with a 'good' internet connection, video and audio capability and access to the selected video conferencing platform and selected digital collaboration tool.

### **For facilitator(s)/teaching staff**

- A laptop, tablet or similar device – with a 'good' internet connection, video and audio capability and access to the selected video conferencing platform and selected digital collaboration tool.
- We strongly recommend the use of a second laptop, tablet or similar device – with a 'good' internet connection, video and audio capability and access to the selected video conferencing platform and selected digital collaboration tool.
  - We use one device to lead and manage the video conferencing tool – deliver lecture material and workshop facilitation instructions, share slides and screen views, manage breakout rooms, monitor chat and requests for help and so on.
  - We use the second device to monitor the digital collaboration tool.
  - For example, when visiting a team's breakout room on the first device, we'll also view the specific current activity in the digital collaboration tool on the second device.
  - The other benefit of having two devices is that if one fails for whatever reason, you have a backup device you can fall back to.



## Workshop Planning and Delivery

### *Setting objectives*

Each class or workshop will, of course, be different. Without wishing to stray too far into pedagogical methodology in this document, it will be important to define both learning- and project-related objectives. These might have significant overlaps or be quite distinct.

For example, a class or workshop focused on idea generation might include learning objectives focused on the development of collaboration and communication skills. In contrast, the project-related objectives might centre on identifying and articulating one or more ideas to progress to the next stage of the project.

### *Workshop planning*

The '*Design Thinking for Student Projects*' book includes 20+ facilitated activities. A number of these will usually be combined to run in a single class or workshop. Which and how many of the activities should be run in the same class or workshop will depend on a number of factors, including the stage of the project, the time available for the session and so on.

To make this guide as useful as possible, we've opted to include advice, guidance and recommendations through use of a worked example. For this, we've selected planning and running an **Idea Generation Workshop**, consisting of four discrete activities, with a time limit of 2 hours.

1. Review of existing knowledge (diverge)
2. Idea generation – using the Big Ideas technique (diverge)
3. Idea prioritisation – using the Prioritisation Grid technique (converge)
4. Idea selection and description (converge)

Planning steps include:

- Define the learning and project objectives, as outlined above.

- Design the workshop session content, delivery approach and logistics to successfully enable attendees (e.g., students) to work effectively in their team(s) and meet the session's learning and project objectives.
  - As this is most academics' bread and butter, we haven't included further details of how to do this here.
- Ensure the appropriate technology will be available.
  - The technology, itself, is covered in quite a lot of detail above, although it's worth repeating the recommendation about scheduling an introduction and practice exercise beforehand, if this is the first-time attendees will have used the selected digital collaboration tool.
- Identify and invite attendees.
  - The meeting will require to be set up and scheduled on the video conferencing platform and meeting sign in details made available to identified attendees.
    - The meeting configuration should include appropriate configuration settings for security and potentially advanced settings, such as the use of pre-configured breakout rooms.
  - If this is a timetabled session, students will (of course!) already have the session in their timetables but will still need to receive the video conferencing meeting access details.
  - Any additional facilitators and/or industry guests may also need to be invited.
- Communicate workshop objectives.
  - These should be communicated to the attendees prior to the session (e.g., as part of the closing summary of the previous week's session or via email) and included in the introduction of the planned workshop.
  - For the Idea Generation workshop, the project-related objectives are to generate and prioritise new ideas and select and articulate a prioritised idea to progress to the next stage of the project

- Set up and communicate any prerequisite preparation activities needed.
  - For the Idea Generation workshop, we personally mandate our students watch a pre-recorded online mini lecture we've created on Creativity Techniques ahead of the session.
  - As detailed above, if the workshop is the first time the attendees will be using the digital collaboration tool, it is recommended to set up and communicate a mandated practice exercise.
- Create an overall structure with timings for the workshop.
  - This should include the introduction, each activity, suitably scheduled breaks and time for playbacks and a summary of actions and close of the session.
    - It's important to include suitable breaks for attendees (if not the facilitators!), particularly when running online to address potential 'Zoom fatigue'.
  - For the Idea Generation workshop, we've suggested a potential structure with timing and activities in the 'Workshop Delivery and Facilitation' section below.
- Think through workshop delivery, including generating empathy for the attendees, to identify and address things which may potentially go wrong.
  - As this is what most academics and workshop facilitators will do anyway, we haven't included extra details of how to do this here.

## Workshop Delivery and Facilitation

In this section, we've assumed you'll be facilitating multiple teams running workshops in the same session. Generally, we support up to eight teams in an online workshop, facilitated by two members of staff. In this case, we usually allocate each member of staff to support half of the teams. When we do this, we tend to rotate support, that is, if one member of staff will support and access the breakout rooms of Teams 1–4 one week and Teams 5–8 the next, and vice versa. The number of teams is slightly lower than we support during in room workshops,

due to the need to enter the breakout rooms and then having less direct visibility of what the whole class is doing at this time.

If you're facilitating a workshop with a single team, lucky you! You can simply ignore the points made below about managing multiple teams and focus on the specific recommendations we've included for you.

### *Setting up the technology*

- Video conferencing tool (e.g., Zoom) – begin the online meeting and welcome attendees. If required, set up and configure breakout rooms and add attendees to the rooms ready for use.
  - The more you can do to set this up ahead of the meeting, the better.
- Digital collaboration tool (e.g., MURAL) – ensure attendees have links to their teams' digital walls. We usually make these available to attendees beforehand and also copy the links into the video conferencing tool chat.
  - As described above, we recommend pre-creating and configuring a wall for each team, populated with the activity templates for the specific individual activities you plan to facilitate.

### *Facilitating the workshop*

Apologies if we've gone over the top a little bit below, but here's how we'd facilitate the worked example of an Idea Generation workshop.

We've assumed the previous week's workshop was focused on understanding and generating empathy for end users, including creation of an End-User Persona, Empathy Map and As is Scenario.

- **09:00–09:15: Introduction**
  - Summary of previous workshop session activities and learning – understanding and generating empathy for end users, including creation of an End-User Persona(s), Empathy Map(s) and As is Scenario(s).

- Recap of prerequisite activities – we provide our students with an online mini lecture on Creativity Techniques. In class, we ask multiple choice questions on the topic to verify learning – assessing learning by viewing answers in an app (or via responses using the chat function).
- Reminder of where we are in the overall innovation management process – we're in the Idea Generation phase.
- Outline of objectives of the idea generation workshop – generate and prioritise new ideas and select and articulate a prioritised idea to progress to the next stage of the project.
- Walkthrough of workshop agenda – sign-posting each step we plan to work through.
- Opportunity for attendees to ask questions.
- **09:15–09:35: Activity 1 – Review of existing knowledge (converge)**
  - The teams are assigned 20 minutes to remind themselves, discuss and summarise key points from what they've already learned.
  - The attendees are recommended to focus on their assigned challenge, the output of their research into the challenge, including interview(s) with an industry expert (if applicable) and output of previous Design Thinking and related activities to understand and generate empathy for end users.
  - As part of this action, attendees are encouraged to browse the activities already populated in their team's project wall, created using the selected digital collaboration tool, such as MURAL. These activities are likely to include Challenge Description, Stakeholder Mapping, Project Research Canvas, End-User Categories, End-User Persona(s), Empathy Map(s) and As is Scenario(s).
  - Once the activity has been introduced, attendees are assigned to their team breakout rooms.

- During this activity, the teaching/facilitation team quickly visit each breakout room to review team progress, answer questions and offer advice.
- At the end of the allocated time, the activity is brought to a close by closing the breakout rooms.
- **09:35–09:50: Activity 2 – Idea generation – using the Big Ideas technique (diverge)**
  - Introduction of the Big Ideas technique – highlighting the diverge nature of the activity, stressing the need to consider existing knowledge and encouraging generation of diverse idea, including creative ‘wild card’ ideas – ‘it might not be possible, but wouldn’t it be great if we could...’ and so on.
  - Direct teams to begin using the technique and highlight the time available.
    - Attendees diverge to generate ideas, writing these on virtual sticky notes and posting the sticky notes onto the Big Ideas area of the team’s wall using the selected digital collaboration tool, such as MURAL.
  - Once the activity has been introduced, attendees are asked to enter their ideas without discussion. As this is a diverge activity, attendees remain in the main virtual room and are not assigned to the team breakout rooms.
  - During this activity, the teaching/facilitation team monitor the team walls on the digital collaboration tool to ensure each team is making progress and team members are engaged.
  - If facilitating a single team, the facilitator may prompt the team to consider any potential obvious gaps in ideas which they have not yet been considered.
  - At the end of the allocated time, the activity is brought to a close.
- **09:50–10:00: Break**
  - A short break is included here to enable attendees to recharge their batteries and avoid ‘Zoom fatigue’. We stress attendees must return on time.
  - Attendees are also encouraged to add any additional ideas which come to mind during the break to the Big Ideas area.

- If facilitating a single team, or a small number of teams, the facilitator may use the break to review the ideas generated and move some of the ideas around the Big Ideas area, for example, to group similar ideas together, to save time in the next activity.
- **10:00–10:40: Activity 3 – Idea prioritisation – using the Prioritisation Grid technique (converge)**
  - Introduction of the Prioritisation Grid technique – stressing the converge nature of the activity, the need to collaborate and communicate effectively and need to complete the exercise in the allocated time.
  - Direct teams to begin using the technique and highlight the time available.
    - Attendees converge to review the ideas for value and feasibility and place them onto the appropriate position on the Prioritisation Grid area of the team’s wall using the selected digital collaboration tool, such as MURAL.
  - Once the activity has been introduced, attendees are assigned to their team breakout rooms.
  - During this activity, the teaching/facilitation team quickly visit each breakout room to review team progress, answer questions and offer advice.
    - Experience shows some teams carry out this activity very quickly, while others deliberate over every idea in minute detail. Facilitation activities often include directing teams not to spend too little or too much time on each individual idea, to ensure they complete the activity to an appropriate level and on time.
  - If facilitating a single team, the facilitator may more directly facilitate, including leading the movement of items from the Big Ideas area and appropriate placement, based upon team discussions, onto the Prioritisation Grid.

- At the end of the allocated time, the activity is brought to a close by closing the breakout rooms.
- **10:40–10:50: Activity 4 – Idea selection and description (converge)**
  - Introduction of the activity – team selection of a prioritised idea, or group of linked ideas, to carry forward into the next session and creation of a short, written description of the idea.
  - Direct teams to begin using the technique and highlight the time available.
    - Attendees converge to select a prioritised idea, or a group of linked ideas, and enter a short description in the Idea Description area of the team’s wall using the selected digital collaboration tool, such as MURAL. Typically, the selected idea(s) will be from the top right-hand quadrant of the Prioritisation Grid.
  - Once the activity has been introduced, attendees are assigned to their team breakout rooms.
  - During this activity, the teaching/facilitation team quickly visit each breakout room to review team progress, answer questions and offer advice.
  - If facilitating a single team, the facilitator may act as a scribe, documenting the team’s description of the idea in the Idea Description area of the team’s wall using the selected digital collaboration tool, such as MURAL.
  - At the end of the allocated time, the activity is brought to a close by closing the breakout rooms.
- **10:50–11:00 – Playback, summary and close**
  - Playback of session objectives and discussion on progress.
  - Confirmation of follow-on activities and actions – posting of the idea description onto a specified online workspace, team review and further research into the selected idea in preparation for the next session.



- Walkthrough of the next session's activities, including the objectives of the planned workshop activities, and a summary of any prerequisite work required.
- Opportunity for attendees to ask questions.

## Key Hints and Tips

### *For facilitators*

- Preparation, preparation, preparation – the better you prepare for and plan the workshop, the better the outcome is likely to be.
- Generate empathy for the attendees – put yourselves in their shoes – if you were one of the attendees, what support and guidance would you like to receive from a facilitator, including any specific considerations due to working in an online environment?
- Read the virtual room – to understand what's going well and what might not be. Is there something in the workshop or in your own approach which needs to be tweaked or changed? This is harder to do than in a physical room, but the breakout rooms in particular offer a mechanism to do this, particularly if attendees are encouraged to have their cameras on during the breakout converge discussions. If in doubt, ask open questions to the group and/or individual teams or attendees and actively listen to the answers.
- Ensure divergence and convergence requests are adhered to – conversation between team members should be kept to a minimum (or better still, zero!) during diverge techniques and actively encouraged during converge techniques. As the facilitator, it's part of your role to ensure this happens. It's much easier to do online for the diverge activities, as you can keep people in the main virtual room and mute their microphones. There may be less opportunity online for converge activities, due to the need to visit multiple breakout rooms in the limited time available, but positively

encouraging convergence and use of cameras in the breakout rooms can be particularly useful.

- Consider how to best motivate individuals and teams – be a constructive but positive friend when reviewing progress and offering advice in the breakout rooms.
- Spend time with each team to understand any team-based and/or individual attendee issues – as you know, not everyone learns and works the same, but all team members should be contributing. Obvious or potential team dynamic issues should be reviewed and, if necessary, addressed to ensure each team achieves the best outcome they can. This is significantly easier to do when facilitating one team, but even when you're supporting a number of teams, you can have a significant positive influence on their work when visiting the breakout rooms.
- Watch the clock – if you have a fixed end time, it's important that all steps are completed by the end of the session and sufficient time is included at the end for playback and close. However, it's also sometimes good to be flexible, in order to achieve the best results. This is significantly easier to do when facilitating a single team. When working online, we also need to ensure we don't spend too long in a single breakout room, to ensure we spend some time with all teams.
- Follow up on any agreed next steps and actions.

### *For workshop attendees*

- Preparation, preparation, preparation – if you've been asked to complete any actions before the workshop, ensure these are done, so that both you and your teammates can get the most from the workshop.
- Generate empathy for the facilitator – put yourselves in their shoes – if you were the facilitator, what would you want the attendees to do, including any specific considerations due to working in an online environment?
- Generate empathy for your teammates – we know the phrase 'there's no "I" in "team"' is a bit of an old cliché, but as a member of the team, you should have a

good view of what your teammates might expect from others, including yourself.

Ask yourself if your own actions and behaviours are living up to this. In particular, we'd encourage you to have your cameras switched on during the breakout sessions, so you can read and react to each other's expressions and body language and collaborate online more effectively.

- There are no bad ideas or inputs – be a constructive but positive friend when reviewing your teammates' inputs.
- Ensure divergence and convergence requests are adhered to – be quiet and generate your own inputs in diverge activities and actively and positively contribute when the team is converging.
- Watch the clock – if you have a fixed ending time, it's important each step and all activities are completed on time.
- Follow up on any agreed next steps and actions.
- We also provide a detailed set of recommendations for working online, particularly when pitching or presenting, in Chapter 10 of the book.