

# 1

## Preparing for a Workshop



### Check What You Know

In her position as a new trainer for 21st Century Software, Cybelle has been asked to deliver a workshop on meeting planning for team leaders. She's pleased to have been given this responsibility. She's also excited, and a little nervous. Although she has facilitated many meetings, she has never delivered a training workshop. Seeking advice, she calls Leon, a colleague from her last job who has been delivering training workshops for more than twenty-five years.

"I'll be glad to help," Leon says. "What would you like to know?"

"Everything!" Cybelle says. "I don't even know where to start."

"Well, let's start there," Leon laughs. "The first thing you need to do is prepare for this workshop. I've got a little free time tomorrow. We can go over the essential tasks and some of the things to keep in mind while you do them."

What are some of the tasks that Leon might tell Cybelle that she needed to do to prepare for her workshop? What are some of the things that he might suggest she keep in mind?

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When you go to the theater, the production you see didn't spring into being a few minutes before the curtain went up. It is the result of weeks, even months, of careful preparation to ensure that all the elements—the lighting, the sets, the sound, the costumes, the actors—work together seamlessly to provide a unique theatrical experience, to set a mood, to make you laugh, or cry, or wonder, or think. Successful workshops also do not just happen—the foundation for success is laid long before the participants walk into the room. It takes careful preparation for all the elements to work together to provide participants with a seamless learning experience.

Here's what you'll find in this chapter:

- The importance of preparation to the success of a workshop
- What's involved in preparing for a workshop
- What to consider when preparing for a workshop

*Much of the difference between success and failure has to do with one simple word: preparation.*

Karen Lawson, *The Trainer's Handbook* (2nd ed.)

## 1. The Importance of Preparation

### Check What You Know

Which of the statements about preparing for a workshop are accurate?

1. \_\_\_\_ Nervousness at the beginning of a workshop can result from insufficient preparation.
2. \_\_\_\_ Experienced trainers rarely neglect to prepare adequately for a workshop.
3. \_\_\_\_ Trainers sometimes think of preparation as something that takes them away from their real work.
4. \_\_\_\_ Trainers who neglect the preparation process might never succeed at setting up an environment that is conducive to learning.



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Even trainers who fully understand the importance of preparation may neglect to give it enough time and attention. They go about the process in a haphazard way, squeezing preparation tasks into an already overcrowded schedule. They make room requests, and send out notices to participants, and then forget to follow up. They don't get around to preparing handouts or looking at the script until the last minute. They lie awake the night before the workshop, anxious about whether things will work out okay, and then rush into the room a few minutes ahead of the participants, only to find that the setup is wrong, equipment is malfunctioning, or essential materials and supplies are missing. When participants start to arrive, they are busy rearranging furniture, unpacking boxes, or fumbling with the slide projector. They get started late and then feel surprisingly nervous, their mouths dry and their voices tremulous as they try to find their places in the script while participants roll their eyes and wonder what kind of day they're in for.

That kind of start to a workshop can be very hard to overcome. Trainers who neglect the preparation process risk appearing less professional and credible, often find it difficult to establish rapport with participants, and may never succeed at setting up an environment that is conducive to learning.

People who are new to training may neglect to prepare properly because they don't realize what's involved and what the results of inadequate preparation are likely to be. But even experienced trainers sometimes neglect certain aspects of preparation. Preparing for a workshop takes time, often more time than trainers expect, and trainers sometimes consider preparation time as something that takes them away from their "real" work. They forget that preparing to conduct a workshop *is* an important part of their real work. Preparation time is also an investment: when it's used thoughtfully and carefully, it pays big dividends in the form of a workshop that runs smoothly and achieves results.

## **2. What's Involved in Preparation**

Like any project, the process of preparing for a workshop involves lots of tasks. You might be responsible for carrying out all of those tasks yourself, or you might have help with some of them, such as those related to making the logistical arrangements, notifying participants, and preparing the materials. But even if you do not carry out all the tasks yourself, keep in mind that you have a real stake in whether or not everything is done, and done right, because you are the one who will have to deal with any problems on workshop day. And, as you will see, there are certain preparation tasks that only you can do.

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# THINK ABOUT IT



What are some of the tasks involved in preparing for a workshop that you will always have to do yourself, no matter how much assistance you have from others?

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The tasks involved in preparing for a workshop fall into several general categories. You'll learn about them in detail in the following chapters. First, here's an overview:

- *Scheduling the workshop and planning the learning environment.* Scheduling can be one of the most challenging tasks in the preparation process. You can't have a workshop without participants, but finding times when everyone who wants or needs to attend is available can be a logistical nightmare. You need a physical environment that is conducive to learning, but learners' schedules need to be coordinated with facility availability. Your workshop might require the participation of subject-matter experts, company executives, outside speakers, or others, whose schedules also need to be considered. Finding dates when everyone and everything you need are available can take some time, so it's very important to start this process as early as possible.
- *Selecting and notifying participants.* People are selected for training in different ways. Some are self-selecting—they make the decision to attend a workshop on their own, because they are interested in the topic or think that the training will be useful to them. Some have no choice about

attending—the training is required for their work. Others are “strongly encouraged” to attend by their managers or others, possibly to improve a real or assumed performance deficiency or to prepare them to take on new responsibilities. Some will already be familiar with the workshop because they were involved in its design; many will learn about the training for the first time when they receive notice that they have been enrolled. From a trainer’s perspective, the way in which participants are selected and the way in which they learn about the workshop can have significant effects on their readiness to learn.

- *Producing and obtaining materials and supplies.* It’s easy to spot a trainer in an elevator—she’s the one with rolled-up flip-chart pages under her arm and a laptop over her shoulder, dragging a huge suitcase behind her. Workshops require lots of stuff—trainer guides, handouts or participant workbooks, prepared flip-chart pages, posters, name tents, writing tables, marking pens, props, videos, game materials, and more. All that stuff takes time to produce and assemble. To avoid last-minute panic and keep from exhausting yourself before the workshop, think carefully about exactly what you need and leave enough time to produce or obtain each item. Otherwise, you might have to spend the day before the workshop running around looking for props and putting workbooks together—and still discover that you’re missing something important when the session begins.
- *Preparing participants for training.* People who walk into a workshop knowing only the title, the location, and the time are likely to spend most of the first hour or so trying to figure out what it’s all about and what it has to do with them. On the other hand, those who have a good understanding of why the workshop is being held, what will be covered, how the subject relates to them and their work, and the ways in which the training will benefit them are more likely to arrive ready to learn. The more you can do to prepare participants for the workshop, the more quickly you will be able to engage them in the learning process.
- *Preparing yourself to conduct training.* When I was in my first two years of college, I would often spend most of the night before a big test trying to catch up with all the studying I’d neglected during the semester, drinking cup after cup of coffee and forcing myself to stay awake as long as I could. The next morning, I’d drag myself bleary-eyed into the classroom for the

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## What's Involved in Preparation

- Scheduling the workshop and planning the learning environment
- Selecting and notifying participants
- Producing and obtaining materials and supplies
- Preparing participants for training
- Preparing yourself to conduct training
- Making contingency plans

test. It wasn't until I was in my senior year that I finally learned there was a better way—that if I prepared for tests and papers ahead of time, I'd do better, because I'd arrive relaxed, rested, and far more clear-headed.

Preparing yourself is one of only a few workshop preparation tasks that you must do yourself. But it's not only one of the most important tasks, it's one that many trainers leave until the night before the workshop, when they should be relaxing and getting some rest. The time you spend getting to know the workshop inside and out and practicing your delivery pays big

benefits. The more prepared you are, the more credible you will seem, the more confidence you will project, the less nervousness you'll experience, and the more smoothly the workshop is likely to go.

- *Making contingency plans.* It's a fact of life that, no matter how carefully you plan and prepare, something is likely to go wrong. There is so much involved in putting on a workshop that you can expect at least a few problems—misunderstandings about the room setup, malfunctioning equipment, missing supplies, people being called out to deal with emergencies. Of course, you can't anticipate everything, but thinking ahead of time about what could go wrong and preparing backup plans will keep you from feeling anxious and make it easier to deal with problems so that they do not derail the workshop.

### 3. What to Consider When Preparing for a Workshop

## THINK ABOUT IT



When you tackle a complicated project, what are some of the things that you do to keep yourself organized, keep the project on track, and meet your deadlines?

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Preparing for a workshop is like carrying out any other project: the more organized you are, and the more attention you pay to the details, the better the chances of achieving your goals. Here are some suggestions for using the preparation process to best advantage so that both you and your learners are ready on workshop day.

- *Use checklists.* Detailed checklists that include responsibilities and deadlines help you stay organized, ensure that you don't miss anything, and let you spot problems early enough to resolve them easily. Like to-do lists, your checklists should be reviewed and updated at least once a day—more often if necessary. See the sample checklist on page 9 for some ideas.
- *Confirm and reconfirm all the logistical arrangements.* There are few things worse than arriving at the training site to find that the facilities people have lost the room reservation, although a close second is having the room set up entirely wrong and finding that none of the equipment or material you need is there. No matter who makes arrangements for the facility, the setup, the equipment, the materials, and the refreshments, confirm every little detail yourself. Then confirm them again so that you will not arrive on the day of the workshop to find that the slide projector is missing and

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no one ever saw the room setup instructions—or that the room has been given away to someone else.

- *Learn as much as you can about the participants.* Why are people attending this training? How much do they already know about what to expect? What jobs do they do? Do they work closely together or are they strangers? Will managers and their direct reports be attending the workshop together? The more you know about the participants, the more easily you'll be able to adapt the content and activities to meet their specific needs and the more prepared you'll be for issues that might come up during training.
- *Make contact with participants before the workshop.* Even if someone else signed people up, get in touch with participants in person, by phone, or by e-mail to introduce yourself, explain the reasons for the workshop, provide a preview, and describe what to expect during the session. If it's appropriate, give participants a brief pre-workshop assignment that helps them start thinking about the topic—and perhaps prepares them for an opening activity. Making a personal connection with the participants ahead of time will make it easier to establish rapport and help both you and them feel comfortable on workshop day; providing them with key information about the workshop and stimulating their thinking about the topic helps prepare them to learn.



## Sample Preparation Checklist

Workshop Title: \_\_\_\_\_

Workshop Date: \_\_\_\_\_

| Task | Responsibility | Complete by | Confirm by |
|------|----------------|-------------|------------|
| 1.   |                |             |            |
| 2.   |                |             |            |
| 3.   |                |             |            |
| 4.   |                |             |            |
| 5.   |                |             |            |
| 6.   |                |             |            |
| 7.   |                |             |            |
| 8.   |                |             |            |
| 9.   |                |             |            |
| 10.  |                |             |            |

## To Consider When Preparing for a Workshop

- Confirm and reconfirm all the logistical arrangement.
- Learn as much as you can about the participants.
- Make contact with participants before the workshop.

## Quick Quiz

List the three to five key learning points from this chapter that will be most helpful to you.

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## Apply What You Learn

Use the Preparation Checklist at the end of the chapter to help you prepare for your next workshop.



## What's Next?

Now that you have an overview of what needs to be done to prepare for a workshop, you're ready to examine each of the important tasks in more depth. In the next chapter, you'll learn how to handle the complicated task of scheduling a workshop and plan an environment that will be conducive to learning.

## Answers to Exercise

### Check What You Know

Which of the statements about preparing for a workshop are accurate?

1. ☒ Nervousness at the beginning of a workshop can result from insufficient preparation.
2. ☐ Experienced trainers rarely neglect to prepare adequately for a workshop.
3. ☒ Trainers sometimes think of preparation as something that takes them away from their real work.
4. ☒ Trainers who neglect the preparation process might never succeed at setting up an environment that is conducive to learning.



## Preparation Checklist

Make a preliminary checklist of tasks that need to be done to prepare for your workshop. Indicate whether you or someone else will do each task. Include dates by which a task needs to be done and dates on which you will confirm arrangements.

Workshop Title: \_\_\_\_\_

Workshop Date: \_\_\_\_\_

| Task | Responsibility | Complete by | Confirm by |
|------|----------------|-------------|------------|
| 1.   |                |             |            |
| 2.   |                |             |            |
| 3.   |                |             |            |
| 4.   |                |             |            |
| 5.   |                |             |            |
| 6.   |                |             |            |
| 7.   |                |             |            |
| 8.   |                |             |            |

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