

Facilitating a UX Design Workshop



Facilitation turns individual expertise into shared decisions and ownership



Workshops manage energy, participation, and decisions toward a defined output



Roadmap: when to workshop, framing, agenda, dynamics, converging, follow-through



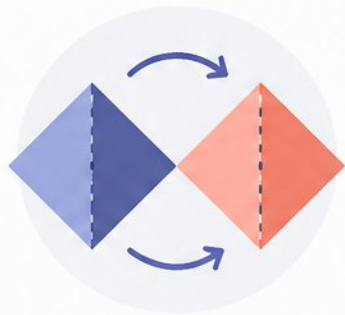
Learn to plan, sequence activities, protect safety, and produce durable artifacts



Why Workshop Formats Beat Meetings for Design Work



Meetings exchange information across topics; workshops solve a defined problem



Diverge-and-converge cycles turn discussion into a tangible artifact



Core UX types: discovery, empathy, design, prioritization, critique



Preparation gap: brief, agenda, materials, buy-in — often longer than the session

When a Workshop Is the Right and Wrong Choice

Choose a workshop for

- cross-functional alignment, ambiguous problems, and shared ownership



Is a workshop
the right choice?

Skip it if

- one owner just needs input, or the outcome is pre-decided



Alternatives: focused meeting with pre-read, async doc, or 1:1s for power-laden topics



**Focused meeting
with pre-read**



Async doc



**1:1s for
power-laden topics**

?

Ask first: what artifact must exist, who owns it, is trust high enough?

Defining a Sharp Goal, Success Criteria, and a Workshop Brief



Write one primary goal first, then work backwards to activities



Skip the list of favorite exercises; let the goal choose them



Brief: objective, key questions, attendees, environment, success



Sharp goal names the decision, audience, and working constraint



Never promise one session will resolve everything — plan follow-through

Workshop Brief



Objective

Key questions

Attendees

Environment

Success



Framing the Challenge with How Might We Questions



Start from insights,
not opinions: agree
on top findings first



Each word works:
"How" assumes
solutions, "Might"
lowers stakes, "We"
is collective



Formula: How might
we [verb] [subject]
so that [outcome]?



Scope spectrum:
too broad gives no
direction, too narrow
smuggles in a solution



Aim for the sweet
spot: specific enough
to focus, open enough
for surprising answers

Writing and Choosing HMW Questions with the Team



Quality check:

grounded in insight,
outcome-focused,
positive, broad,
solution-free



**Write 3-5
variations per
insight using
different lenses**



Lenses:

amplify the good,
remove the bad,
explore the opposite,
question assumptions



**Expect 15-30
candidates, then
cluster and dot vote
to 2-3 prompts**



Avoid:

one HMW per insight,
keeping every question,
facilitator rewording



Audience, Roles, and Pre-Workshop Logistics



Pick participants for decision authority, making ability, and domain expertise



Include the voices usually left out of the conversation



Name every role: facilitator, co-facilitator, note-taker, timekeeper, participants



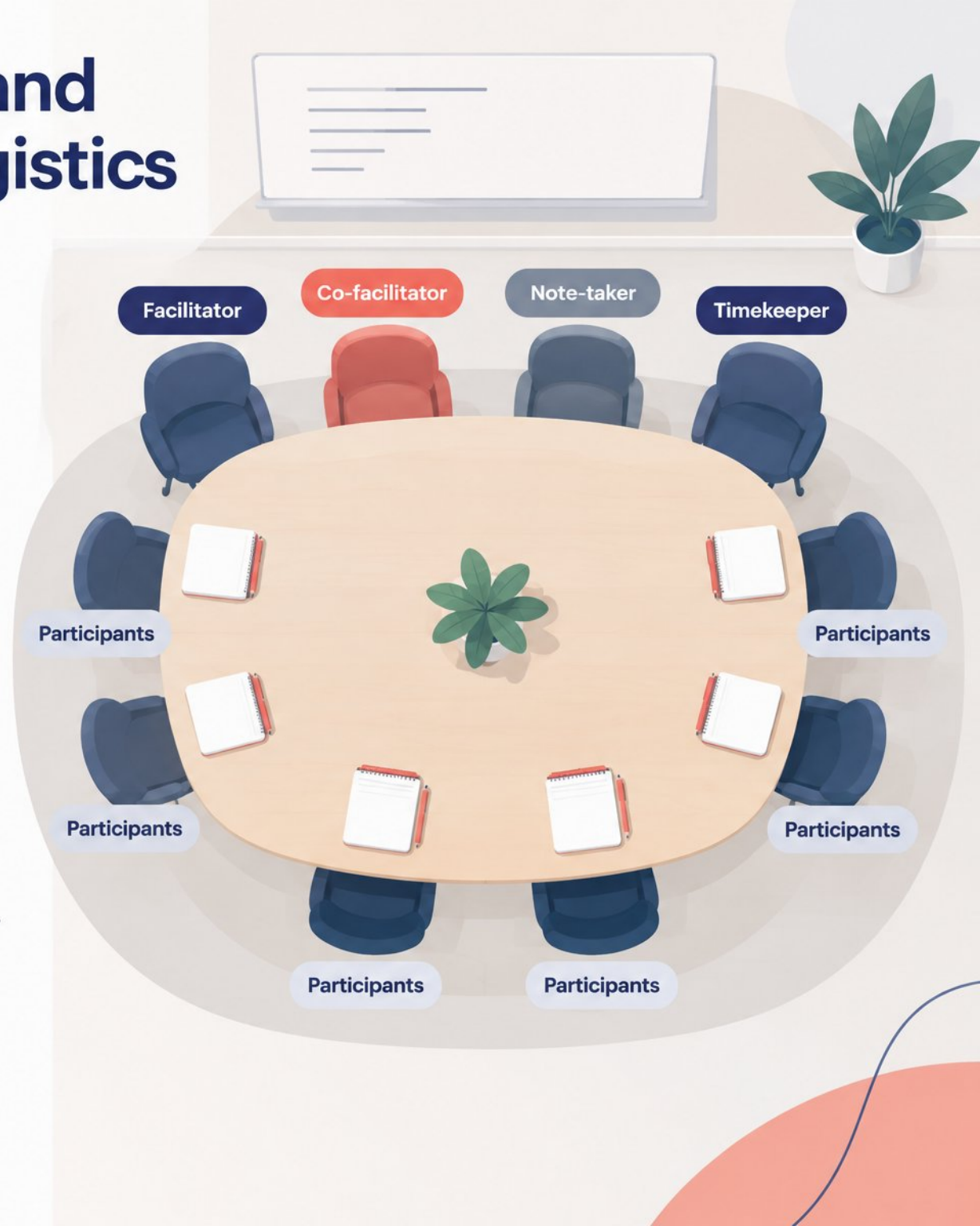
A co-facilitator can moderate chat and watch the room



Shrink live time with pre-work: fact packs, pre-reads, prompts, tool onboarding



Cap at eight; beyond that, you lose your ability to include everyone



Choosing Formats and Tools for In-Person, Remote, and Hybrid

In-Person



Remote



Hybrid



Remote: shorter blocks, 90 minutes to half day; split full days



Engage every 5–7 minutes; chat gives introverts a parallel voice

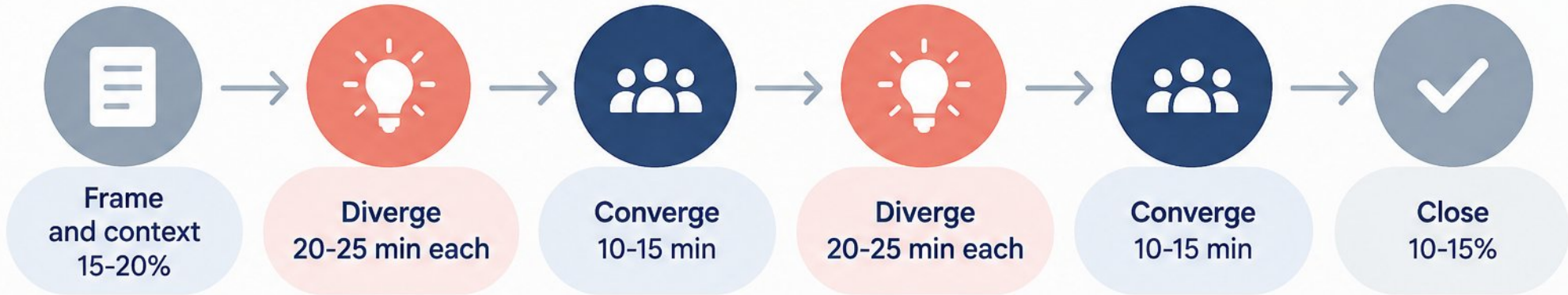


Stack: video platform, whiteboard (Miro, Mural, FigJam), polls, shared decisions doc



Hybrid is hardest; substantive work → go all-virtual or all-in-person

Designing the Agenda Around Diverge-and-Converge Cycles

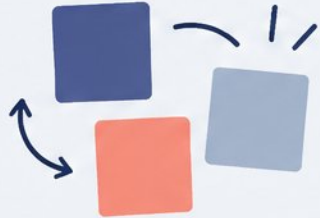


- Alternate diverge (parallel generation) with converge (cluster, rank, pick) cycles
- Frame and context: 15-20%; diverge blocks 20-25 min each; converge 10-15 min; close 10-15%
- Every activity needs a one-line purpose; its output feeds the next block, or cut it
- Timings in fives leave room for discussion that will inevitably run over
- A room that only diverges ends with a wall of stickies and no decision



A Practical Activity Library and Pacing Choices

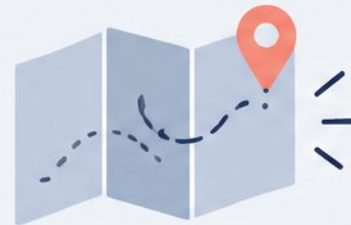
Assumption mapping



The four buckets



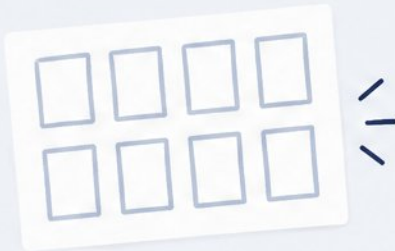
Opportunity mapping



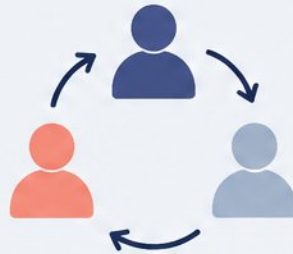
Silent brainwriting



Crazy 8s



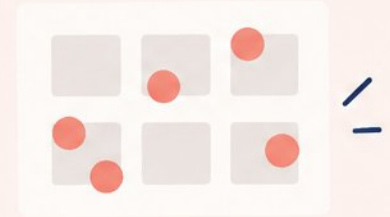
Round-robin sketching



Reverse brainstorm



Dot voting



Discovery and framing: assumption mapping, the four buckets, opportunity mapping



Ideation: silent brainwriting, Crazy 8s, round-robin sketching, reverse brainstorm



Prioritization: dot voting, impact-effort matrix, MoSCoW, value vs. risk, \$100 test



Pacing: keep exercises slightly short to force focus and keep energy up



Alternate solo and group work; protect breaks (7 min per 53, 70/30 work-to-break)



Opening the Session: Agreements, Warm-Ups, and Psychological Safety



Bake safety into the format: anonymity vs. collaboration, guided templates vs. free ideation



Co-create agreements: airtime, listening, the right to pass, handling disagreement



Use low-risk warm-ups and silent writing before group sharing



Prevent anchoring on the first speaker; surface quieter voices



Manage seniority: hierarchy suppresses candor; skip big round-robin intros



Facilitating in the Moment: Instructions, Interventions, and Difficult Dynamics



Give clear instructions, demonstrate first; progressive disclosure keeps focus



Interventions: pace, process, pulse



Behavioral redirect: describe behavior, state impact, redirect

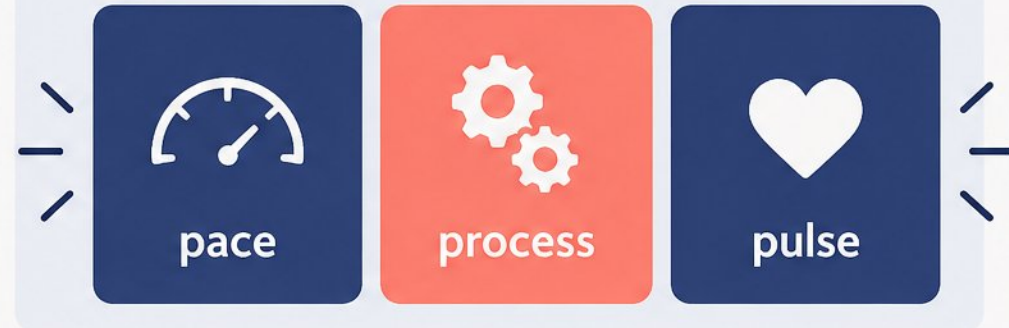


Read the room: cameras off, lagging replies, side chats



Signals to change pace, shift activity, or take a break

Interventions



Behavioral redirect



Converging: Decision Models, Prioritization, and Consent



Three models: consensus (all agree), consent (no reasoned objection), consultative (one owner decides)



Consent test: safe enough to try, good enough for now – set a review date

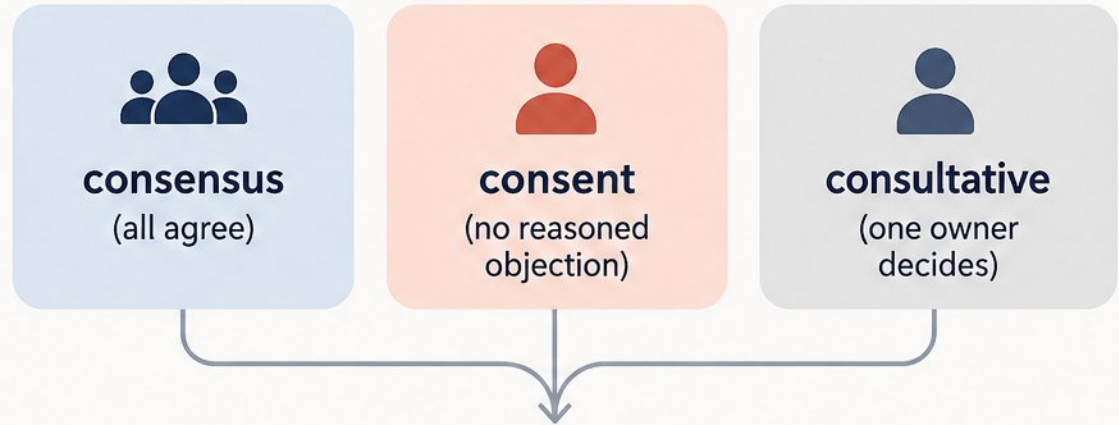


Pair the model with dot voting, impact-effort, or weighted scoring

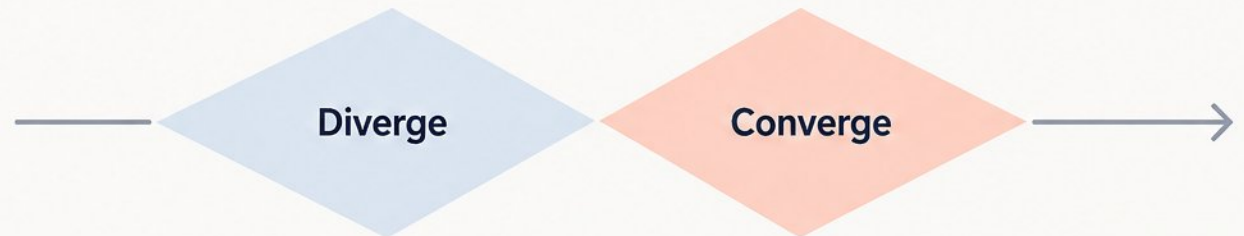


Name the decision owner before the room disperses

Decision Models



Consent Sequence



Closing, Documentation, and Building a Facilitation Practice

Synthesize Together



Document Decisions

Decision	Alternatives	Rationale	Date	Owner
				
				

Share and Grow



Close the container:
synthesize live, confirm
next steps while
everyone is present



Reflect together:
short round or
one-word checkouts
to capture the room



Log decisions durably:
decision, alternatives,
rationale, date, owner



Share outcomes
with absent
stakeholders via
summary, board
export, or recap



Grow deliberately:
co-facilitate, seek
feedback, join a
community of practice



Certification
pathway: IAF Core
Competencies and
the CPF credential

PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/2dedaa28/public