

Workshop Planning Checklist

A step-by-step guide to planning and running a workshop or virtual event that actually lands. Print it, work through it, and check off each step as you go.

1 Before You Start: Define and Align

- ☐ Clarify the single most important outcome for this session.
- ☐ Identify who is in the room: their roles, experience level, and what they care about.
- ☐ Write 2 to 3 clear, specific learning objectives.
- ☐ Confirm the date, start time, duration, and time zone.
- ☐ Confirm the format: in person, virtual, or hybrid.
- ☐ Set the budget and confirm who signs off on it.
- ☐ Name a single point of contact on the client side.

2 Design the Experience

- ☐ Build an agenda with realistic timing and built-in breaks.
- ☐ Balance teaching with practice, discussion, and Q and A.
- ☐ Prepare your slides, worksheets, and any handouts.
- ☐ Plan an interactive moment every 10 to 15 minutes.
- ☐ Gather real-world examples and scenarios your audience will recognize.
- ☐ Decide how you will measure success: feedback, a poll, or follow-up.

3 Tech and Platform (Especially Virtual)

- ☐ Confirm the platform and that every attendee can access it.
- ☐ Test audio, video, and screen sharing ahead of time.
- ☐ Prepare polls, breakout rooms, and a plan for the chat.
- ☐ Assign a producer or host to manage tech and logistics.
- ☐ Have a backup plan for a connection or platform failure.
- ☐ Send calendar invites with the link and clear instructions.

4 The Run of Show: Day Of

- ☐ Arrive or log in early to set up and test everything.
- ☐ Open with a warm welcome and the goal for the session.
- ☐ Keep the energy up and keep an eye on the clock.
- ☐ Capture questions you cannot answer live for later follow-up.
- ☐ Leave time for a clear close and defined next steps.

5 After the Workshop

- ☐ Send a thank-you along with any resources you promised.
- ☐ Share a short feedback survey while it is fresh.
- ☐ Debrief internally: what worked and what to improve.
- ☐ Follow up on open questions and action items.
- ☐ Capture ideas for the next session.

One rule that saves every session: plan for the work to happen during your team's sharpest hours. A workshop scheduled when people are alert lands far better than the same content in an afternoon slump.