

Facilitating a Microsoft Teams Workshop – notes and suggestions

Initial planning

- Be realistic in considering what you want to achieve and allow plenty of time to properly prepare for the workshop
- Plan for each segment of the workshop to take longer than you would expect in a physical setting, to allow for slower conversations and any tech-related delays
- Aim to spend as much time as possible in small sub-groups with a maximum of 5 participants
- Plan for lots of scheduled breaks in your agenda and be flexible with your expectations

Preparation tasks

- Set up sub-group Teams calls in Outlook in advance – include timing expectations and links to SharePoint
- Appoint sub-group leaders in advance who are both Teams and SharePoint-savvy
- Prepare working documents in advance such as spreadsheets, PowerPoint worksheets or sandboxes – include links for these in the Outlook appointments and brief your sub-group leaders on their use
- Establish an area of SharePoint that all participants can access so that they can view and edit the working documents

Establishing ground rules

- Everyone must use their webcam and be prepared to do so when they join the call – it makes a huge difference to engagement
- Let everyone know that unscheduled breaks are OK – if participants need a comfort break, leg stretch or need to check on their children for example, make it clear that this is accepted and encouraged
- Encourage the use of the chat function if people feel they are not able to get their point across verbally

Other essential tips for success

- Invite each participant to introduce themselves properly – even if you know each other well – maybe sharing something positive about their day to break the ice and compensate for any lack of small talk
- Incorporate a ‘dry run’ into your preparations – bounce ideas off colleagues to test the appropriateness of your agenda
- Stick to your agreed agenda – especially making sure you finish on time
- Share successes and learnings with others

Example format for 3-hour workshop

