

# Checklist for Workshops You are Hired to Deliver

## Workshop discovery phase: from first communication to proposal submission

- ☐ Be professional and timely in all your communications with the organization.
- ☐ Offer to provide any materials and resources on you and your business (CV, resume, brochures, web pages, LinkedIn profile).
- ☐ Schedule a meeting to do a needs assessment.
  - What had the organization decided to reach out to you?
  - How many participants who will be doing the workshop?
  - Where will you be delivering the workshop?
    - What will be the travel expenses, if any?
- ☐ What additional tasks will be required of you before or after the workshop?
- ☐ Who is printing the workbook/worksheets, providing the flip charts, markers, or anything else you are going to need?
- ☐ What snacks, meals, and beverages will be provided to the participants?
- ☐ Write up the proposal. Be sure to include what the organization is providing.
- ☐ Follow-up in a couple of days if you have not gotten an acknowledgment of your proposal submission.

## After you've gotten the answer to your proposal

- ☐ If you hear back from the organization and it's a "No"
  - "We decided to go in a different direction". Thank them for their time and end things on a positive high note so if that "other direction" should not work out, now or in the future, they think of you and how great and professional you were receiving their "no".
  - "Staffing changes have changed our needs". Ask about their changing needs to see if you meet those new needs. If so, give some bullet points

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- on how you can help and see if the proposal can be modified to meet their changed needs.
  - “We just don’t have the money in our budget at this time”. Ask what their budget is and offer to scale your services to meet their needs within their budget. Note, I’m not saying give a discount or give away part of your services for free. I’m saying, offer to scale down what you will provide so that it can come within their budget.
- ☐ If you hear back from the organization and it’s a “Yes”
  - Express your gratitude to that connection.
  - Find out who your contact will be for coordinating the logistics.
    - Location, hotel and your travel, if necessary
    - Workbook and slides, if they want your slides pre-loaded on their computer
    - A/V for the room
    - Food and beverages
    - Communicating with the participants
    - If you are sending pre-work, when do they need all of this?
- ☐ Can you get the names and titles of the participants in advance?
- ☐ Can you deliver or get access to a feedback survey?
- ☐ If you are using slides confirm there is a projector
- ☐ If you are playing an audio or video, make sure the room has a sound system or bring speakers that hook up to the computer
- ☐ Create a flexible timeline that includes everything contained in the workshop.
- ☐ Design your workshop based on the time of day you will be executing each part
- ☐ Be prepared to the point that you will have fun doing the workshop rather than stressing out about whether or not you’re ready

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## Best practices for the day of the workshop

- ☐ Arrive early to:
  - meet your contact
  - get yourself set up
  - make sure the A/V equipment is working properly
  - confirm the room is configured in a way that suits your goals
  - ensure lighting is sufficient
  - check the air conditioning is working properly
  - pass out the workbooks
  - have name tags or name cards ready to be filled out
  - make sure snacks and refreshments are available for the participants
  - place your beverages and snacks are in easy reach
  - take pictures of the room as “before” pictures. You can use these on social media to promote your services
  - Be ready to greet your participants with a smile as they come in
- ☐ [Suggested but not required] keep caffeine and sugar to a minimum
- ☐ Introduce yourself and go over the logistics
  - If you are meeting at a location the participants are not familiar with, tell them where the bathroom is
  - Tell them what time the breaks and meals are roughly going to be, and what time you’ll be ending
  - Give them a sense of the kinds of activities they’ll be engaging in so they can mentally prepare for them
- ☐ Do an activity to warm the group up
- ☐ Use the timeline you created in advance, yet be flexible to meet the needs of the participants
- ☐ Pay attention to the overall energy of the room to sense if you need to calm the group down or get them re-energized

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- ☐ Be sure everyone has a chance to speak and get their questions answered
- ☐ If someone seems withdrawn find an opportunity to check in with them on the next break
- ☐ Have fun!
- ☐ Have the participants complete a feedback form or survey to get feedback on the different aspects of the workshop
- ☐ Thank the participants wholeheartedly for their time and contributions to the workshop
- ☐ If okayed by the organization, offer your contact information and handles on social media platforms to the participants so they can reach out to you if they would like to, follow you, get to know you better, or inquire into your products and services
- ☐ Only offer “opt-in freebies” if you have gotten permission by the organization

## Best practices after you have delivered the workshop

- ☐ Be mindful of what you need to recover and do what you can to take care of yourself
- ☐ Within a day or two send a thank you to the person or people at the organization you had contact with, whether it's the decision maker, the committee, or the coordinator
- ☐ Offer to do a follow up meeting to see if the workshop did its job and to see if there are other services or workshops you can provide to continue to serve them