



# Running a UX workshop:

## CHECKLIST

### ☐ Planning and preparation

- ☐ Define the primary goal – what outcome do you need?
- ☐ Identify the right participants (core team + subject matter experts)
- ☐ Choose the right workshop format (e.g., design sprint, ideation, critique)
- ☐ Select key exercises and structure the agenda
- ☐ Prepare and share a fact pack (background materials, relevant data)
- ☐ Schedule the session and send calendar invites
- ☐ Arrange necessary tools (whiteboards, sticky notes, Miro, FigJam, etc.)
- ☐ Assign facilitation roles if needed

### ☐ Running the workshop

- ☐ Start with a clear introduction and goal setting
- ☐ Set ground rules for collaboration (no interruptions, timeboxing, etc.)
- ☐ Balance solo and group brainstorming
- ☐ Keep exercises short and timeboxed
- ☐ Use decision-making techniques (dot voting, prioritization grids, etc.)
- ☐ Monitor engagement and energy levels—adjust as needed
- ☐ Schedule breaks strategically (7 minutes every 53 minutes)
- ☐ Capture key insights and decisions in a structured way

### ☐ Post-workshop follow-up

- ☐ Summarize key takeaways and decisions
- ☐ Share workshop outputs with participants
- ☐ Gather final feedback (e.g., what worked, what could improve)
- ☐ Assign action items and responsibilities
- ☐ Schedule follow-up meetings if necessary



## Running a UX workshop:

# SESSION TEMPLATE

**Workshop title** (E.g., “Improving checkout UX for mobile users”)

**Date & time** (E.g., March 15, 2025, 10:00 AM - 1:00 PM)

**Facilitator(s)** (Your name & any co-facilitators)

**Participants** (List of attendees & their roles)




**Workshop goal** (What do you want to achieve? Be specific! E.g., “Identify top 3 usability issues in the checkout flow and brainstorm solutions”)

### Workshop agenda (3-hour example)




TIME	ACTIVITY	OBJECTIVE	TIPS FOR FACILITATORS
10-10:15 AM	<b>Welcome &amp; workshop overview</b>	Set expectations, create a collaborative space	Greet participants, state the goal, set ground rules, and outline the agenda
10:15-10:25 AM	<b>Icebreaker activity</b>	Energize participants and build rapport	Try speed intros, UX horror stories, or “Design in 3 words” to engage the group.
10:25-10:55 AM	<b>Problem definition</b>	Align everyone on the problem space	Use fact pack review, HMW statements, and user perspective mapping; avoid jumping into solutions too early
10:55-11:40 AM	<b>Ideation &amp; brainstorming</b>	Generate a broad range of ideas before refining	Solo brainstorming → group share → crazy 8s → dot voting; prioritize quantity over quality initially
11:40 AM-12:10 PM	<b>Prioritization &amp; decision-making</b>	Narrow down and refine the best solutions	Use the effort-impact matrix, now-next-later framework, or

			involve real users in voting
12:10-12:30 PM	<b>Next steps &amp; action plan</b>	Define clear outcomes and responsibilities	Assign action items, set deadlines, and schedule follow-ups. Document everything
12:30-12:40 PM	<b>Workshop closing &amp; feedback</b>	Gather final insights and assess effectiveness	Quick roundtable on key takeaways, ask for workshop ratings, and invite final comments

### Key materials & prep

-  **Pre-read materials:** [Link to fact pack]
-  **Tools required:** [Miro, Figma, sticky notes, whiteboards, etc.]
-  **Decision-making framework:** [Dot voting, prioritization, etc.]

### Post-workshop follow-up

-  **Summary & takeaways:** [Write a brief recap]
  -  **Action items & assignments:** [List responsible individuals]
  -  **Next steps & follow-up meeting (if needed):** [Details]
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