

Digital Strategy Workshop Organizer

Prioritization and alignment involve a lot of moving pieces. Use this worksheet to organize details as you plan the workshop to present your findings, recommendations, and define a future state with clear next steps.

Use with: Digital Strategy Facilitation Guide to plan the workshop and during the session.

Brainstorm your attendees

Write down individuals or groups/offices that should be invited to make sure all key stakeholders are represented. Check the "required" box if their participation is mandatory; this will help in scheduling!

Name/Group/Office	Req?	**Name/Group/Office**	Req?

Organize your findings

Common hopes and fears (from interviews, and in-person exercise).

You can use these to seed your in-person hopes and fears exercise, but be sure to generalize them.

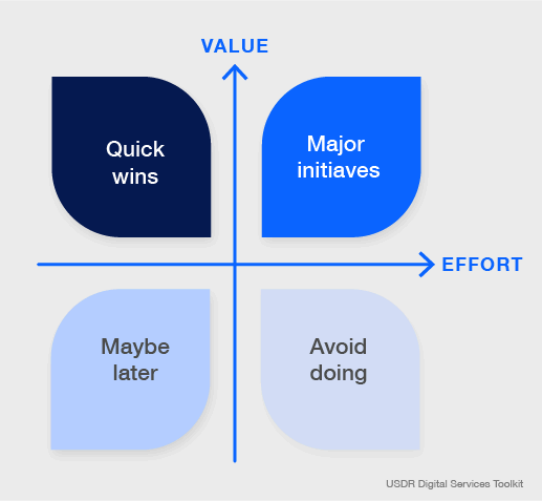
Hopes	Fears
Examples: Our teams can work together better.	*Examples: This team will take resources away from mine.*

Common themes or topics from your research

List of topics/themes from info gathering stage (one idea per sticky note)	Categories for topics/themes
Examples: "Who will this team report to?" "How long do we have approved budget?" "What will this team own?"	*Examples: Team longevity, funding, organizational support*

Defining the lean prioritization matrix axes *for your organization*.

Prioritization can be bogged down or derailed completely through a disagreement over terms. To prevent this, choose labels for your matrix ahead of time, and provide the definitions to workshop attendees. The labels are there to facilitate prioritization, not to be perfect terms of art.



Vertical axis: How much is this connected to our mission or our users core needs/top tasks?
Possible terms for this: *value, importance, benefit*

Horizontal axis: How much work will it take to do this?
Possible terms: *effort, cost, time, work*

See all the topics and the digital services maturity model in the Digital Service Toolkit



Digital Strategy Facilitation Guide

This guide provides a practical run-of-show for aligning on the current state, prioritizing what matters, and turning discussion into action.

Use with: Digital Strategy Workshop Organizer. Complete the organizer before the session, then keep it beside you as the facilitation plan and source for workshop materials.

Before the Workshop

At a glance

- **Recommended agenda:** 4 hours across 2 sessions
  - **Session 1:** 2 hours 20 minutes
  - **Session 2:** 1 hour 30 minutes
- **Recommended participants:** decision-makers, delivery leaders, program and operational partners, and people closest to user needs
- **Primary outputs:** 2-4 priorities, measures of progress, owners, and near-term actions

Plan the session

Use the organizer to make the workshop specific to your organization before participants enter the room.

What the workshop should achieve

1. Build a shared understanding of the organization's current digital services state.
2. Surface hopes, concerns, and different perspectives without trying to solve everything at once.
3. Identify a small set of high-value priorities and practical measures of progress.
4. Confirm ownership and a path for decisions after the workshop.

Facilitation team

- **Lead facilitator:** guides discussion, protects time, and remains neutral on the outcome.
- **Content lead:** presents research findings and answers factual questions.
- **Producer or note-taker:** manages materials, captures decisions, and maintains the parking lot.

Suggested agenda

Session 1: Align and prioritize (2 hours 30 minutes)

Duration	Activity	Expected output
10 min	Welcome and frame	Purpose, outcomes, and norms
35 min	Exercise 1: Hopes and fears	Shared perspectives and concerns
35 min	Exercise 2: Present findings	Aligned view of the current state
10 min	Break	Rest and transition
60 min	Exercise 3: Prioritize	2-4 priority areas and draft measures

Session 2: Finalize decisions (1 hour 30 minutes)

Duration	Activity	Expected output
5 min	Reorient and review outputs	Shared focus for the decision session
5 min	Re-confirm current and future state	Shared 6-12 month direction
10 min	Confirm 2-4 priority areas	Agreed initiatives to move first
20 min	Define start, stop, and continue actions	Specific actions for each priority
15 min	Define measures of progress	2-4 trackable measures
15 min	Align on structure and support	Owners, authority, and support needs
10 min	Set immediate next steps	30-60 day actions and follow-ups
5 min	Read back commitments	Confirmed owners, dates, and check-in schedule
5 min	Close and confirm follow-up	Shared understanding of what happens next

Decision-session focus: Use this session to confirm commitments, not to reopen the full prioritization discussion. Capture unresolved items in the parking lot with a clear owner and resolution path.

Prepare for alignment

Strong preparation keeps the live session focused on interpretation and decisions rather than logistics or wordsmithing.

1. Complete the Workshop Organizer

- [ ] List potential attendees and mark whose participation is required.
- [ ] Generalize interview hopes and fears so comments cannot be attributed to individuals.
- [ ] Turn research findings into one idea per sticky note, then group related ideas into clear themes.
- [ ] Choose and define the vertical and horizontal matrix axes in language that will make sense to participants.

2. Shape the participant list

Invite enough perspectives to make the decisions credible, but keep the working group small enough to participate. Aim for 6-15 people when possible.

1. Include people with authority to approve or resource next steps.
2. Include people responsible for implementation and service delivery.
3. Include perspectives close to residents, customers, staff, or other service users.
4. Identify likely points of disagreement and decide whether pre-conversations are needed.

3. Build the materials

- [ ] A short findings presentation focused on themes and patterns
- [ ] One sticky note or digital card per topic/theme, ideally no more than about 20
- [ ] A visible value-effort matrix with the agreed axis names and definitions
- [ ] A parking lot for questions outside the workshop scope
- [ ] A decision log and action tracker for the follow-up session
- [ ] Markers, sticky notes, dots, timer, and accessible virtual equivalents

4. Send a participant pre-read

- [ ] Send email to the participants with context on the workshop

Suggested language: “We will use this working session to build a shared view of our current digital services state and identify a small set of priorities. Please review the attached findings in advance. You do not need to arrive with solutions; come ready to share reactions, ask questions, and make tradeoffs.”

Workshop Exercises

Open and frame the workshop

Set expectations for participation, decisions, and scope before beginning the exercises. Allow 10 minutes.

Opening sequence

1. Welcome participants and name why their perspective matters.
2. State the workshop purpose and the outputs you expect by the end.
3. Review the agenda, timing, and how the separate decision session will work.
4. Confirm working agreements and explain the parking lot.
5. Clarify who will make final decisions and what the group can decide today.

Suggested language: “Today is about creating a shared view of where we are and identifying the few areas that deserve our attention next. We will not solve every issue in the room. We will capture important questions, make tradeoffs, and leave with a clear path to decisions and action.”

Suggested working agreements

1. Share the air so every perspective can be heard.
2. Critique ideas and assumptions, not people or teams.
3. Use evidence and examples; distinguish facts from interpretations.
4. Name disagreement without requiring immediate resolution.
5. Respect timeboxes and use the parking lot for out-of-scope items.

Check before continuing

- [ ] Do participants understand the session’s scope?
- [ ] Is the decision-maker present or is the later approval path explicit?
- [ ] Is the note-taking method visible and accessible?
- [ ] Has the group agreed to the axis definitions that will be used later?

Exercise 1: Hopes and fears

30 minutes | Goal: Surface perspectives and build trust

Set up

Prepare two visible spaces labeled Hopes and Fears. Seed each with generalized examples from the Workshop Organizer only if the group needs help getting started.

Suggested language: "Before we discuss findings or priorities, we want to hear what people hope will become possible and what they are concerned could happen. We will acknowledge what is shared without debating or solving it yet."

How to run it

1. Give participants 3-5 quiet minutes to write one thought per note.
2. Invite each person to share one hope and one fear, or collect responses anonymously when power dynamics may limit candor.
3. Cluster similar responses without over-editing participants' language.
4. Reflect back the major patterns and ask whether anything important is missing.
5. Name which concerns can be addressed through workshop norms, which belong in the parking lot, and which should inform later decisions.

Prompts

- What do you hope these meetings make possible?
- What do you hope improves for service users or staff?
- What concerns you about digital services or digital transformation?
- What would make this process feel unsuccessful or unsafe?

Facilitator moves

- **If debate starts:** "We are gathering perspectives right now. Let's capture that response and return to it when we discuss findings or decisions."
- **If comments get personal:** Restate the observation as a system, process, or outcome concern and remind the group of the working agreements.
- **If the room is quiet:** Use one or two generalized examples from the organizer, then allow another minute of silent writing.

Capture: A clustered list of hopes and fears, plus any facilitation risks or decision criteria the group should keep in view.

Exercise 2: Present findings

30 minutes | Goal: Align on the current state

Set up

Organize the findings around a small number of patterns. Briefly introduce digital services teams and the maturity model only to give participants a shared frame; keep the majority of the time on what you learned locally.

Suggested language: "These findings are a synthesis of what we heard and observed. They are meant to help us see patterns, not to evaluate individual teams or settle every factual question today."

How to run it

1. Present the purpose, sources, and limits of the research.
2. Share 4-7 key themes, using plain-language headlines and a small amount of evidence for each.
3. Pause for clarifying questions after each section; defer solutioning and detailed exceptions.
4. Ask participants what resonates, what surprises them, and what may be missing.
5. Update wording only when a change improves accuracy without obscuring a real difference in perspective.

Discussion prompts

1. Where are we today?
2. Which patterns most affect users' ability to complete their top tasks?
3. What capabilities or practices are already working well?
4. Where do we want to be in the next 6-12 months?
5. What should start, stop, or continue?

Keep the discussion useful

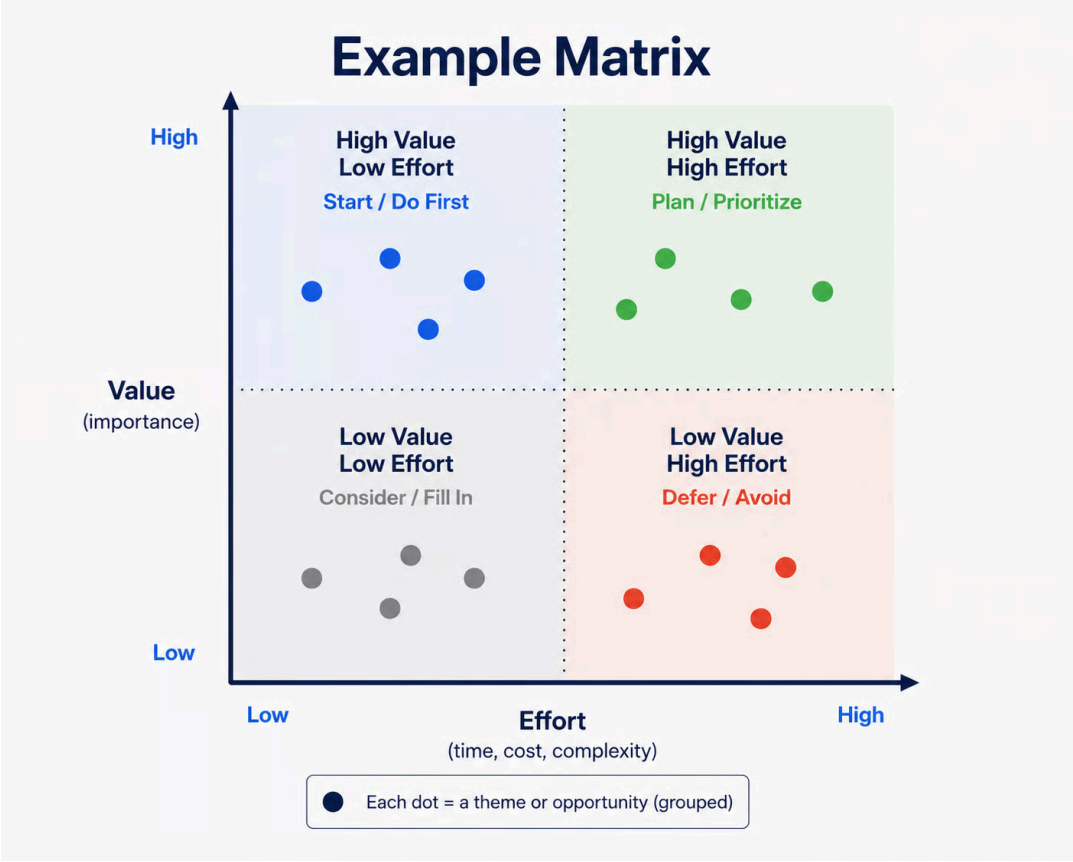
- **Focus on patterns:** Capture exceptions, but do not let one exception erase a repeated theme.
- **Separate accuracy from agreement:** Participants can agree that a concern exists even when they interpret its cause differently.
- **Protect confidentiality:** Do not attribute interview comments unless explicit permission was given.

Capture: A validated set of themes, important corrections, unresolved questions, and candidate topics for prioritization.

Exercise 3: Prioritize

30 minutes | Goal: Focus on high-impact next steps

Set up the matrix



Use the axis labels and definitions selected in the Workshop Organizer. A common version is:

- **Vertical axis - value:** How strongly is this connected to the mission or to users' core needs and top tasks?
- **Horizontal axis - effort:** How much time, cost, complexity, coordination, or change will this require?

Important: The labels support a useful conversation; they do not need to be perfect terms of art. Confirm the definitions, then move into placement.

How to run it

1. Show the consolidated set of roughly 20 topics, with one topic per note.
2. Read each topic aloud and clarify its scope in one sentence.
3. Invite the group to place the topic on the matrix, asking first about value and then effort.
4. When views differ, place the note between positions or mark the disagreement. Do not force false consensus.
5. Review the full matrix, rebalance obvious clustering, and combine true duplicates.

6. Select 2-4 priority areas, usually from high-value quadrants, and identify 2-4 possible measures of progress.

Discussion prompts

- Which items are essential to the mission or users' top tasks?
- What must be true before this item can begin?
- Which items unlock progress elsewhere?
- What can we learn or deliver within 30-90 days?
- How will we know conditions are improving?

If prioritization stalls

- **Everything is high value:** Ask which item would most improve the user experience or reduce the greatest risk if only one could move this quarter.
- **Everything is high effort:** Break broad themes into smaller actions or identify a low-cost learning step.
- **The group debates wording:** Timebox clarification, record the working definition, and keep moving.

Capture: The completed matrix, 2-4 priority areas, rationale for selection, disagreements or dependencies, and 2-4 draft measures of progress.

Exercise 4: Finalize decisions

60 minutes | Goal: Confirm priorities, assign ownership, and define the path forward

Schedule this as a separate session when possible. Include the people with authority and operational knowledge needed to commit resources and owners.

Before the session

- ☐ Share the completed matrix, proposed priorities, unresolved questions, and parking lot.
- ☐ Convert each priority into a concise outcome statement.
- ☐ Identify decisions required, likely owners, dependencies, and any information still needed.
- ☐ Prepare a visible action tracker.

How to run it

1. Review the priority areas and the rationale from the first session.
2. Resolve only the questions necessary to confirm what moves forward first.
3. Confirm the desired outcome and scope for each priority.
4. Assign one accountable owner and identify supporting roles.
5. Agree on the next 30-90 day actions, target dates, and dependencies.
6. Confirm measures of progress and schedule the first check-in.
7. Read back commitments before the meeting ends.

Suggested language: "Our goal today is not to reopen the full prioritization conversation. It is to confirm what will move forward, who owns the next step, and how we will review progress."

Decision questions

- What decision still needs to be made?
- What will move forward first, and what is explicitly deferred?
- Who is accountable for the outcome?
- What should happen in the next 30, 60, and 90 days?
- What evidence will show progress?
- When and where will the team review results?

Action tracker

Complete one row for each confirmed priority. Keep the owner field to one accountable person, even when several teams support the work.

Priority	Owner	Next action	By when	Measure/check-in

After the Workshop

Close the loop and keep momentum

Turn the workshop record into a concise decision and action summary within two business days.

Close each session

1. Summarize what the group aligned on and where disagreement remains.
2. Review priorities, owners, actions, and dates aloud.
3. Confirm who will receive the notes and when.
4. Explain how parking lot items will be handled.
5. Invite one final question: “What would make it difficult to follow through?”

Send the workshop record

- [ ] Purpose and participant list
- [ ] Key hopes, fears, and findings themes
- [ ] Photo or export of the final matrix
- [ ] Confirmed priorities and rationale
- [ ] Owners, next actions, target dates, and dependencies
- [ ] Measures of progress and check-in schedule
- [ ] Parking lot items and their disposition

Maintain momentum

1. Schedule regular check-ins to review evidence and remove blockers.
2. Celebrate early wins and learning, not only completed projects.
3. Revisit priorities as user needs, constraints, or organizational conditions change.
4. Treat digital transformation as an ongoing practice rather than a one-time initiative.

Recommended cadence: Hold the first check-in within 30 days. Use a short, repeatable agenda: progress against measures, decisions needed, blockers, and next actions.

Facilitator quality check

- [ ] The outputs are understandable to someone who did not attend.
- [ ] Every action has one accountable owner and a date.
- [ ] Measures describe observable change, not only activity completed.
- [ ] Unresolved decisions have a clear owner and resolution path.
- [ ] Participants know when they will reconvene and what to prepare.

See all the topics and the digital services maturity model in the Digital Service Toolkit