MY WORKSHOP TOOLS™



CHECKLIST

WORKSHOP DAY CHECKLIST

Your go-to reference for before, during, and after your session

Overview

Workshop days can feel busy, even when you're fully prepared. This checklist is designed to help you stay focused on what matters most by giving you a simple, practical reference for the tasks and reminders that support a successful session.

Work through the items before participants arrive, keep the checklist nearby throughout the workshop, and use the final section to wrap things up afterward. The goal isn't perfection. The goal is preparation, presence, and creating a great experience for the people in the room.

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SECTION 1

Before the Workshop

The Night Before / Morning Of

- ☐ Review the full agenda and confirm run-of-show timing
- ☐ Re-read all facilitator notes and key talking points
- ☐ Confirm participant count and any last-minute changes
- ☐ Print all handouts — bring extras (at least 10% more than needed)
- ☐ Print a spare copy of the agenda for your own reference
- ☐ Pack supplies: markers, sticky notes, pens, tape, name tags
- ☐ Pack the parking lot flip chart or designated capture sheet
- ☐ Charge laptop, clicker, and any backup devices
- ☐ Load slide deck and confirm it opens correctly
- ☐ Test audio/video equipment if the session uses media
- ☐ Confirm room booking and location details
- ☐ Arrive at least 60 minutes before the session starts
- ☐ Set up seating to match the session style (circle, U-shape, tables)
- ☐ Place handouts, pens, and name tags at each seat
- ☐ Post the parking lot sign in a visible spot
- ☐ Do a quiet tech run-through — slides, sound, screen visibility
- ☐ Take a breath, centre yourself, and set a positive intention
- ☐ Greet early arrivals warmly and make them feel welcome

SECTION 2

During the Workshop

Ongoing Throughout the Session

- ☐ Start on time — respect everyone's schedule
- ☐ Open with a warm welcome and brief personal introduction
- ☐ Run a short icebreaker or name round if the group is new to each other
- ☐ State the session objectives clearly at the outset
- ☐ Establish group norms or ground rules early
- ☐ Monitor time at each section — adjust pacing as needed
- ☐ Watch body language for signs of confusion or disengagement
- ☐ Invite quieter participants into the conversation
- ☐ Redirect side conversations respectfully and without embarrassment
- ☐ Use the parking lot for off-topic but important questions
- ☐ Capture key takeaways and group agreements in real time
- ☐ Give energy breaks if the session runs longer than 90 minutes
- ☐ Stay flexible — follow the energy, not just the slide order
- ☐ Close each section with a brief recap before moving on

SECTION 3

After the Workshop

Before You Leave / Within 24 Hours

- ☐ Thank participants sincerely — individually where possible
- ☐ Collect all handouts, workbooks, and printed materials
- ☐ Photograph whiteboards, flip chart pages, and sticky note clusters
- ☐ Gather and transcribe the parking lot items
- ☐ Restore the room to its original setup
- ☐ Do a quick personal debrief — while it's still fresh
- ☐ Note what landed well and what you'd do differently next time
- ☐ Log any participant insights or memorable moments
- ☐ Record all action items and who owns each one
- ☐ Draft and send follow-up notes to participants within 24 hours
- ☐ Share any resources or references promised during the session
- ☐ Update your facilitator notes for future sessions
- ☐ File all materials in the appropriate project or client folder

The preparation is done. Trust the process, stay present, and focus on the people in the room.

You've got this.