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The Workshop Host's Checklist

A plain checklist for running a small in-person workshop, written as sample content for testing PDF editing tools.

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1. Before you invite anyone

Decide what one person should be able to do when the session ends. A workshop with a single clear outcome is easier to plan, easier to describe in the invitation and easier to judge afterwards. Write that outcome in one sentence and keep it where you can see it.

Count the people you can look after properly. For a first session, eight to twelve is comfortable: everyone can be heard, and you can walk the room without losing the thread. Larger groups need a second facilitator.

Pick two dates rather than one. If the first falls through, you already have a fallback and nobody has to be asked twice.

2. Choosing the room

Visit the room at the same time of day as the session. Check where the light falls, how loud the corridor is and whether the door closes quietly. A room that is perfect at noon can be unusable at five.

Look for power sockets, a wall you may write on or tape to, and enough table space for people to spread out their materials. Count the chairs yourself instead of trusting the booking confirmation.

Find the nearest accessible entrance and the nearest toilet, and put both in the invitation. Guests who have to ask on arrival start the session already unsettled.

3. Writing the invitation

Lead with the outcome, then the date, the place and the length. People decide in the first two lines whether the message is for them, so put the practical facts there and the background after.

Say what to bring and what you will provide. If a guest needs to prepare anything, name it exactly and say how long it takes. Vague homework is the most common reason people arrive unprepared.

Ask for replies by a fixed day, and tell people you will send one reminder, no more. A short deadline with a promised reminder gets more answers than an open invitation.

4. Materials and handouts

Print one more copy of every handout than you have guests. There is always someone who spills coffee, brings a colleague or loses a page. Keep the spares in a folder, not at the bottom of a bag.

Number the pages of every handout. When you say turn to page three, the whole room should land in the same place within seconds. Numbered pages also make it obvious when a sheet is missing.

Mark anything that is still being reviewed as a draft. A clear mark on the page saves you from explaining, ten minutes in, that the figures on the second sheet are not final.

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5. Opening the session

Start on time, even if two people are missing. Starting late teaches the punctual guests that their time is negotiable. Use the first minute to say what the session is for and when it will end.

Ask each person to say their name and one thing they hope to leave with. It takes under five minutes for ten people, and it gives you a list of the questions you must not skip.

Agree two or three ground rules out loud. Phones away during exercises and one voice at a time are usually enough. Rules that are spoken are easier to remind people of later.

6. Pacing the middle

Alternate listening with doing. Ten minutes of explanation followed by a short exercise holds attention far better than forty minutes of talk. Plan the exercises first and fit the explanations around them.

Build in a break at the halfway point and keep it short. Ten minutes is enough for water and a stretch. Announce the restart time when the break begins, not when it ends.

Keep a visible clock. People relax when they can see how much time is left, and you are less likely to rush the last exercise.

7. Handling questions

Welcome questions, but park the ones that would take the group off course. Keep a sheet on the wall labelled for later and write each parked question on it, so the person who asked can see it was not forgotten.

When you do not know an answer, say so and promise a reply by a named day. A guest who hears a confident wrong answer will remember it far longer than an honest promise to find out.

Repeat each question before answering it. People at the back may not have heard, and saying it again gives you a few seconds to think.

8. Closing and follow-up

Finish a few minutes early. Spend the last minutes asking each person for one action they will take within a week. Write the actions down or ask guests to write them on a card they keep.

Send the follow-up message within a day, while the session is fresh. Include the slides or handouts, the answers to parked questions and the date of any next session.

A week later, send a single short message asking what people did with the session. The replies tell you more about what worked than any feedback form.

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9. Comfort and access

Offer water and somewhere to put coats before anything starts. Small comforts remove small distractions, and a settled room is a quicker room. If you are serving food, ask about dietary needs on the invitation, not on the day.

Use large, plain type on every handout, and avoid putting key points in a colour alone. Some guests will read from a printout in dim light, and some will not see colour differences at all.

Leave a clear path between the tables. Someone using a stick, a pushchair or a wheelchair should be able to reach any seat without asking others to move.

10. When things go wrong

If the projector fails, carry on without it. Keep a printed copy of the key steps so the session can run from paper. Guests care far more about getting the outcome than about seeing the slides.

If a guest dominates, thank them, then invite someone who has not spoken yet. A direct and friendly request for another voice is usually enough, and it needs no confrontation.

If you run out of time, cut an explanation, never the closing. The last ten minutes are where people decide what they will actually do.

11. Reviewing afterwards

Within two days, write down three things that went well and three you would change. Memory fades quickly, and the second list is the one that makes the next session better.

Keep a single file for each session: the invitation, the handouts, the attendance list and your notes. When you plan the next one, you start from evidence rather than from memory.

Share the notes with anyone who helped. People who see their feedback used are far more likely to help again.

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