

SAFE FOR THE OFFICE™



FACILITATOR GUIDE

PREPARING FOR YOUR FIRST WORKSHOP

A practical guide for first-time facilitators

Overview

This guide is written for anyone who is about to facilitate a Safe For The Office™ workshop for the very first time. Whether you're a manager stepping into a facilitation role, an HR professional running your first group session, or a consultant bringing this program to a new client, this resource will walk you through everything you need to do **before** you walk into that room. It covers how to choose the right workshop for your group, how to write clear objectives, how to communicate with participants in advance, and how to set up your space and technology with confidence. It also gives you a practical day-before checklist and a workshop-morning routine that removes the guesswork when the stakes feel highest. Preparation is the single most powerful tool a first-time facilitator has — and this guide makes sure yours is thorough, focused, and realistic. By the time you finish reading, you'll know exactly what to do, in what order, and why it matters.

NAVIGATION

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Starting Here

Let's be honest about something: running your first workshop is nerve-wracking. It doesn't matter how experienced you are in your field, how many presentations you've delivered, or how well you know the material. The moment you shift from being a participant to being the person *in the room who is responsible for the room*, the stakes feel completely different. That's normal. And it's worth saying clearly: those nerves don't mean you're not ready. They usually mean you care.

What determines whether a first workshop succeeds isn't talent, charisma, or years of facilitation experience. It's **preparation**. The facilitators who walk out of their first sessions feeling good — the ones whose participants walk away with something real — are almost always the ones who prepared with intention. Not obsessively. Not perfectly. With intention.

This guide covers exactly what that preparation looks like. It's organized into seven practical sections, each one addressing a specific part of the pre-workshop process. You'll find checklists, templates, tables, and honest advice. Nothing here is theoretical. Every section reflects what actually works when you're preparing to run a Safe For The Office™ session.

A few things to keep in mind as you read:

- You don't need to do everything perfectly. You need to do the right things well enough.
- Preparation is not the same as scripting every word you'll say. Over-preparation can make you rigid.
- Your participants want you to succeed. They're not waiting for you to stumble.
- The content does a lot of the heavy lifting. Your job is to create the conditions for it to land.

Work through this guide at whatever pace makes sense. Some sections will feel immediately relevant — read those first. Others you'll return to as your workshop date gets closer. By the time you reach the Quick Reference Sheet at the back, you'll have everything you need to walk into that room with confidence.

Let's get you ready.

Choosing the Right Workshop

Match the Workshop to the Goal

The single most common mistake first-time facilitators make is choosing a workshop based on what's available or what seems popular — rather than what their group actually needs. Safe For The Office™ offers a range of workshop formats, and each one is designed for a specific outcome. Starting with the outcome and working backward to the format is how you set yourself — and your group — up for success.

Before you settle on a workshop, ask yourself one question: *What do I want participants to think, feel, or do differently after this session?* If you can answer that clearly, you're already ahead of most first-time facilitators. If you can't, that's the work to do first — and this section will help you do it.

Consider Your Group

The workshop that works brilliantly for a senior leadership team may fall flat with a group of new employees who are still finding their footing. Group dynamics, psychological safety, and existing team relationships all shape which format will land and which will misfire.

Think about your participants before you commit to a format. Consider:

- **Group size** — some formats work best with 8–15 people; others scale to 30+
- **Existing relationships** — teams that know each other well can go deeper, faster
- **Seniority mix** — mixed-level groups need more careful facilitation of power dynamics
- **Prior exposure** — has this group done any workplace culture or inclusion training before?
- **Sensitivity of the topic** — some subjects require a higher baseline of psychological safety

Know What You're NOT Trying to Do

This is just as important as knowing what you are trying to do. A workshop is not a town hall. It's not a lecture. It's not a compliance briefing. If your stakeholders are expecting a checked-box training session and you're planning an experiential, discussion-based workshop, that mismatch needs to be addressed before you begin — not during the session.

Be clear with sponsors and stakeholders about what a Safe For The Office™ workshop will and won't deliver. It creates conversation, not compliance. It builds awareness, not policy. It's a starting point, not an endpoint.

Quick Decision Guide

Your Goal	Recommended Workshop Type	Best Format
Build awareness of workplace behaviour expectations	Foundations Workshop	Half-day, full team
Address a specific incident or pattern on a team	Targeted Dialogue Session	2–3 hours, small group (8–12)
Develop manager capability and confidence	Leader Lens Workshop	Half-day, leaders only
Launch a broader workplace culture initiative	Culture Kickoff Session	Full-day, cross-functional
Introduce SFTO to a new team or department	Introductory Overview	90 minutes, any group size
Reinforce and build on a previous SFTO session	Continuation Workshop	Half-day, same group

Facilitator Tip

When in doubt, start smaller. A focused 90-minute session done well creates more momentum than a full-day session that tries to do too much. You can always build from there.

Setting Clear Objectives

Why Objectives Matter More Than Agendas

Most first-time facilitators spend a lot of time building their agenda. They map out every activity, time-block each segment, and plan transitions down to the minute. That's not a bad instinct — but it puts attention in the wrong place. An agenda tells you what you'll do. **Objectives** tell you why you're doing it and whether it's working.

A well-written objective acts as your compass throughout the session. When a conversation goes sideways, when an activity runs long, when you're not sure whether to push deeper into a topic or move on — your objectives tell you what to do. Without them, you're managing activities. With them, you're facilitating outcomes.

Writing Objectives That Actually Work

Strong workshop objectives share a few characteristics. They are specific enough to be measurable, realistic enough to be achievable in a single session, and meaningful enough to matter to participants. They describe what participants will be able to do, understand, or say differently after the workshop — not what *you* will cover or deliver.

Use this simple structure when writing your objectives:

"By the end of this session, participants will be able to [observable action] [in what context or to what standard]."

The key phrase is **"will be able to."** It forces you to think about capability and behaviour — not just content exposure. Avoid vague language like "understand," "appreciate," or "be aware of." These are inputs, not outcomes.

The Participant's Question: "What's in it for me?"

Your participants are going to walk in asking — at least silently — why this session is worth their time. A clear, honest objective answers that question before they even have to ask it. It also signals that you know what you're doing.

When you share objectives at the start of a session, keep them short and plain. Skip the formal phrasing. Say: *"Here's what we're here to do today, and here's what you'll walk away with."* That's it. It's a promise — and keeping it is how you build credibility as a facilitator.

Sample Objective Statements

Example 1 — Foundations Workshop:

"By the end of this session, participants will be able to identify at least three workplace behaviours that undermine psychological safety and describe one action they can take as an individual to address them."

Example 2 — Leader Lens Workshop:

"By the end of this session, managers will be able to apply a structured conversation framework when responding to concerns raised by team members about interpersonal conflict."

Example 3 — Introductory Overview:

"By the end of this session, participants will be able to explain the purpose and scope of Safe For The Office™ and articulate one personal commitment to workplace respect."

A Common Trap to Avoid

Don't write objectives for your stakeholders and then forget to connect them to your participants. If HR wants "increased compliance awareness" but your participants care about "feeling safe speaking up," find the language that bridges both — and lead with the participant's version.

Preparing Participants

What to Send Before the Workshop

Participants who know what to expect show up ready to engage. Participants who don't know what to expect show up guarded, curious in the wrong ways, or slightly resentful. Pre-workshop communication is one of the most underused tools a facilitator has — and it takes less effort than most people think.

Before the session, participants should receive:

- A clear, friendly invitation explaining the purpose and what to expect
- The date, time, location (or virtual link), and duration
- Any materials they need to read or bring (keep this minimal)
- A brief overview of the workshop format (not the full agenda)
- A contact name if they have questions

How to Frame the Invitation

The language you use in your pre-workshop communication sets the tone for the entire session. If the invitation sounds like a compliance notice, participants will arrive with their defenses up. If it sounds warm, purposeful, and respectful of their time, they'll arrive more open.

Lead with **what's in it for them**, not with what's required of them. Emphasize participation and dialogue over instruction. Avoid corporate buzzwords — words like "learnings," "synergy," and "upskilling" signal that what follows will be a waste of their time.

Managing Expectations in Advance

Be honest in your pre-communication about what the session will involve. If there will be small group conversations, say so. If participants will be asked to share their perspectives or reflect on real situations, give them a heads-up. Surprises create resistance — even when the activity itself is excellent.

You don't need to share every detail. But you should be clear enough that participants arrive knowing roughly what kind of session this is going to be — and feeling respected enough to have been told in advance.

Pre-Workshop Communication Template

Sample Pre-Workshop Email

To: [Participant Name(s)]

From: [Facilitator Name]

Subject: [Workshop Name] — [Date] | What to Expect

Hi [Name],

I'm looking forward to seeing you at [Workshop Name] on [Date] at [Time]. The session will run for approximately [Duration] and will be held at [Location / via video link: insert link].

Here's a quick overview of what to expect:

- This is a participatory workshop — not a lecture. There are no slides to get through and no test at the end.
- We'll be exploring [brief topic description in plain language] through conversation and some structured activities.
- You don't need to prepare anything in advance. Just bring your perspective.
- The session is designed to be practical and directly relevant to your day-to-day.

We'll have [number] people in the room, so there will be plenty of opportunity for discussion without it becoming overwhelming.

If you have any questions before we meet, feel free to reach out to me directly at [email/phone]. Otherwise, I'll see you on [Date].

Looking forward to it,

[Facilitator Name]

[Title]

[Organization]

Room Setup

The Setup Shapes the Session

Walk into any room arranged in theatre-style rows facing a screen and you'll immediately feel something: the expectation that you're there to watch, not to participate. Room setup sends a message before anyone says a word. For a Safe For The Office™ workshop — which is built on dialogue, reflection, and genuine engagement — the physical environment is not an afterthought. It's part of the design.

You won't always get to choose your room. You won't always be able to rearrange furniture exactly how you'd like. But you should always make a deliberate decision about setup — even if that decision is "I'll work with what I've got and here's how." Intentionality is what matters.

Layout Options and When to Use Each

Layout	Best For	Watch Out For
Rounds (circular tables, 4–6 per table)	Small group discussion, breakout activities, trust-building sessions	Some participants have their backs to the front of the room; harder to address the full group
U-Shape (tables arranged in an open U)	Full group dialogue, workshops requiring everyone to see each other	Doesn't scale well above 20 people; can feel formal
Boardroom (single long table)	Small groups (8–12), leadership sessions, high-trust teams	Whoever sits at the head of the table carries perceived authority — seat yourself thoughtfully
Chevron / Angled Rows	Larger groups (20+) where full rearrangement isn't possible	Still signals some degree of audience-presenter dynamic; mitigate by moving among participants
Circle (chairs only, no tables)	High-trust groups, dialogue-heavy sessions, experiential formats	Removes the "safety" of a table for some participants; use only when group is ready for it

Seating That Supports Discussion

Wherever possible, arrange seating so that participants can see each other — not just you. The goal is conversation, and people talk to faces, not to the backs of heads. If you're working with rounds, ask participants to angle their chairs slightly toward the centre of the room when whole-group discussion begins.

Avoid assigned seating unless you have a specific reason for it (e.g., separating participants who tend to dominate when seated together). Self-selected seating usually reflects existing comfort zones, which can be useful information early in a session.

The Details That Get Forgotten

The big setup decisions get made. It's the small ones that tend to trip people up. Before your session, confirm:

Lighting — is it adjustable? Can you dim it for video without losing the room entirely?

Temperature — rooms heat up significantly once full. Set it slightly cool before participants arrive.

Noise — is there construction next door? Can doors be closed? Is the air system loud?

Water and refreshments — people think more clearly when they're not thirsty. Simple provision matters.

Writing materials — pens and notepads at every seat signal that participants are expected to engage, not just listen.

Exit routes and washrooms — know where they are so you can orient participants at the start without fumbling.

Accessibility — confirm the space works for all participants, including those with mobility, sensory, or other needs.

Technology Checklist

Don't Let Tech Derail Your Session

Technology failures during workshops are so common they've become a running joke in facilitation circles. The projector that won't connect. The video that buffers. The microphone that picks up everything except the person speaking. These things happen — and when they do at the start of a session, they cost you something you can't easily recover: the room's confidence in you.

The solution is not to hope for the best. It's to check everything in advance, have a backup for everything critical, and know the moment when you should set the technology aside and just facilitate.

Core Tech Checklist

- ☐ Laptop / device — confirmed working, fully charged, power adapter packed
- ☐ Presentation file — saved locally (not only in the cloud) and tested on the presentation device
- ☐ Projector / display — confirmed compatible with your device; adapters packed (HDMI, USB-C, VGA if needed)
- ☐ Screen resolution — confirmed presentation looks correct at room display resolution
- ☐ Audio — speakers tested; video clips play with sound; volume level appropriate for room size
- ☐ Microphone — tested and positioned correctly if the room requires it
- ☐ Video conferencing (if hybrid) — platform open, camera framing confirmed, remote participants can see and hear
- ☐ Wi-Fi access — confirmed if needed; login credentials available
- ☐ Clicker / remote advancer — charged and tested
- ☐ Whiteboard / flip chart — markers present and not dried out; eraser available

Backup Plans

Every critical piece of technology should have a plan B. Here's a quick reference:

- **If the projector fails:** Can you facilitate without slides? Know which activities work without the screen. Have printed handouts of any critical content.
- **If your laptop won't connect:** Have the presentation saved to a USB drive or accessible via a shared link from any browser.
- **If the video clip won't play:** Know what the clip's key message is and be ready to describe it verbally, or skip it without losing the thread.
- **If the internet drops:** Work offline. Never plan a workshop that cannot run without live internet access.
- **If virtual participants drop out:** Have a designated point of contact who can help them reconnect while you continue with the room.

Low-Tech Is Often Better

The most engaging workshops are often the least technology-dependent. Slides are a crutch when overused, and they shift attention from participants to screens. For Safe For The Office™ sessions, consider using technology minimally — a brief opening slide, a timer on screen, and perhaps a shared visual. Then put the laptop away and be in the room with your participants. That's where facilitation actually happens.

What to Do the Day Before

The Day-Before Mindset

The day before your workshop is not the day to be adding new content, redesigning activities, or reading up on topics you haven't covered. That window has closed. Your job on the day before is simple: confirm, consolidate, and calm down. This is the day you make sure everything that needs to be in place is in place — and then you stop adding to the pile.

Resist the urge to over-prepare at this stage. Facilitators who spend the evening before obsessively reviewing their notes often arrive to the session mentally exhausted before it even begins. Do what's on this checklist. Then close your laptop and get some rest.

Your Day-Before Checklist

- ☐ **Review your objectives** — read them out loud; they should still feel right for this group
- ☐ **Walk through your session plan** — not to memorize it, but to make sure the flow makes sense
- ☐ **Print all handouts and materials** — plus 10% extra for unexpected attendees
- ☐ **Pack your facilitator bag** — markers, tape, sticky notes, printed materials, adapters, clicker, name tags if using
- ☐ **Confirm the room booking** — verify it's still yours at the right time
- ☐ **Confirm AV equipment access** — who has the key, who can assist if something goes wrong
- ☐ **Send a reminder to participants** — brief, friendly, includes location and any last-minute logistics
- ☐ **Review your participant list** — note any names you might mispronounce; check for any known sensitivities
- ☐ **Save your presentation locally** — don't rely on cloud access on the day
- ☐ **Lay out your clothes for the morning** — it sounds small; it reduces decision fatigue when you're already running on adrenaline

Confirming with Participants

A brief day-before message to participants accomplishes two things: it reminds them the session is happening (reducing no-shows), and it signals that you're organized and looking forward to it. Keep it short — two or three sentences is enough. Include the time, location, and your contact information in case anything comes up that morning.

If you know any participants have specific accessibility needs, confirm those arrangements are in place — ideally earlier in the week, but the day before is your last chance to fix anything that's slipped through.

A Word on Preparation vs. Over-Preparation

There's a point at which more preparation stops making you more ready and starts making you more anxious. You'll know you've crossed that line when you're editing slides at 11pm the night before, or when you're re-reading your notes for the fifth time without absorbing anything new.

The checklist above marks the finish line. Once it's done, you're ready. Trust the preparation you've already done — across all the sections of this guide — and give yourself permission to rest. The best thing you can do for tomorrow's session **is to arrive well-rested, calm, and present.**

Important

If you're traveling to a different location for the workshop, do your venue walkthrough today — not tomorrow morning. Know where you're going, where to park, how to get into the building, and who your on-site contact is. Eliminate surprises before they happen.

Workshop Day Preparation

Arrive Earlier Than You Think You Need To

If the workshop starts at 9:00 AM, plan to be in the room — not the parking lot, not the lobby — by 7:45 AM at the latest. For a first session, earlier is better. The time before participants arrive is where so many small problems get solved quietly and invisibly. By the time people walk in, everything should look effortless — because you gave yourself the time to make it so.

Arriving early also gives you something that's hard to put a dollar value on: a few minutes to stand in the room, feel it, and settle into the space. That mental shift from "person walking in" to "facilitator who owns this room" matters more than most preparation guides will tell you.

The 60-Minute Pre-Session Routine

1. **Set up and test all technology** — connect your laptop, run through slides, check audio and video. Fix anything that isn't working before people arrive.
2. **Arrange the room** — set up chairs and tables in your chosen layout. Place handouts, pens, and any materials at each seat or table.
3. **Set up your facilitator station** — position your notes, water, and any reference materials where you can access them without fumbling.
4. **Check the temperature and lighting** — adjust now; it's much harder to do once the room is full.
5. **Write any key prompts on the whiteboard or flip chart** — things you'll refer to during the session so you're not reading from notes.
6. **Put out name tags or tent cards** if you're using them; confirm you have enough.
7. **Do a final review of your opening** — the first five minutes of your session. Know it cold. Everything after that can breathe, but your opening needs to be grounded and confident.
8. **Greet early arrivals warmly** — the pre-session conversation is part of the session. Use it to build rapport, reduce anxiety in the room, and learn something about your participants before you formally begin.

Getting Yourself Ready

The physical and mental side of facilitation is real and often ignored in preparation guides. Here's what helps:

- **Eat something.** Facilitating on an empty stomach — especially when you're nervous — is a recipe for a foggy mind. Eat a proper meal before you arrive.
- **Hydrate.** Keep water accessible throughout the session. You'll use your voice more than you expect, and dehydration compounds anxiety.
- **Breathe.** If nerves hit right before you begin, take three slow, deliberate breaths before you open your mouth. It works.
- **Move your body.** If you have the space, walk around the room before participants arrive. Physical movement helps regulate nervous energy.
- **Leave your phone out of reach** — or on silent in your bag. Checking messages between participants arriving isn't restful; it's distracting.

What to Do If Something Goes Wrong

Something will go slightly wrong. This is not pessimism — it's the reality of facilitation. A participant will challenge a premise. The discussion will go longer than planned. Someone will bring a charged emotional reaction into the room. The trick is not to avoid these moments but to have a default response when they arrive.

Your default response, for almost anything, is this: slow down, not speed up. When something unexpected happens, the instinct is to rush, fill silence, or talk more. The better move is almost always to pause, acknowledge what just happened, and redirect calmly. You don't need to have an answer for everything. Saying "That's an important point — let's come back to it in a few minutes" is a complete and professional response.

One Last Thing

Remember why you're in that room. Not to perform. Not to impress. To create a space where something useful can happen for the people in front of you. When you hold that as your purpose, the nerves become manageable — and the session becomes something worth showing up for.

Key Takeaways

- **Choose your workshop format based on your group's specific goal** — not on what's convenient or popular.
- **Write clear, participant-centred objectives** that describe outcomes, not just topics to be covered.
- **Send a warm, plain-language invitation** to participants at least one week before the session to set the right tone and manage expectations.
- **Design your room setup deliberately** — the arrangement of furniture shapes how people interact before the session even begins.
- **Test every piece of technology in advance** and have a concrete backup plan for each critical element.
- **Complete your day-before checklist** and then stop adding to it — more preparation at that point increases anxiety, not readiness.
- **Arrive at least 60 minutes before participants** to settle the space, yourself, and any last-minute logistics without rushing.
- **Ground your opening five minutes** so thoroughly that even if everything else is imperfect, the session begins with confidence.
- **Take care of your physical state** — eat, hydrate, and breathe — because facilitation is a physical activity as much as a mental one.
- **Slow down when things go wrong** — pause, acknowledge, and redirect calmly rather than rushing to recover.

Quick Reference

Before You Begin

- Choose the workshop format that matches your group's specific goal — start with the outcome, then work backward to the format.
- Write two to three participant-centred objectives using the format: "By the end of this session, participants will be able to..."
- Confirm the session with your sponsor or stakeholder and align on what the workshop will — and won't — deliver.
- Send a friendly, plain-language invitation to all participants at least one week in advance.
- Review your participant list for group size, seniority mix, prior exposure to SFTO content, and any known sensitivities.

Room & Tech Essentials

- Choose a room layout that supports dialogue — rounds, U-shape, or boardroom style depending on group size and session type.
- Set the room temperature slightly cool before participants arrive; it will warm up quickly once full.
- Test all technology — laptop, projector, audio, adapters, clicker — before participants arrive, not as they walk in.
- Save all presentation files locally; never rely on cloud access or live internet for critical session content.
- Have a backup plan for every critical technology element — know which activities can run without the screen.

Day-Before Actions

- Complete your day-before checklist: print handouts, pack your bag, confirm room booking, save files locally.
- Send a brief, warm reminder to participants with time, location, and your contact information.
- Walk through your session plan once — not to memorize it, but to confirm the flow still makes sense.
- If traveling to an unfamiliar venue, do your walkthrough today: know the entrance, parking, and your on-site contact.
- Once the checklist is done, stop. Rest. The preparation is complete — trust it.

Workshop Morning Routine

- Arrive at least 60 minutes before start time — in the room, not the building lobby.
- Set up technology, arrange furniture, place materials at seats, and check lighting and temperature.
- Write key prompts on the whiteboard or flip chart so you're not reading from notes during the session.
- Review and ground your opening five minutes — know it well enough to deliver it without looking at your notes.
- Greet early arrivals warmly; the conversation before the session begins is part of the session.

You have prepared for this. Walk in, breathe, and trust the work you've done.

The room is ready, and so are you.