The AI Facilitation Playbook

Thanks for watching the video, and thanks for grabbing this.

Everything I showed on screen is in here, written out properly so you can copy it straight across. I hope it saves you a few evenings and makes your next session easier to pull together.

What's inside

Before you start: the project setup

Phase 1: Discovery (prompts 1 to 5) Preparing the first call, getting up to speed on their world, and the recap email.

Phase 2: Workshop designing (6 to 9) Testing an activity before you run it, and stress-testing your agenda.

Phase 3: Preparation (10 to 14) Slides, examples, lightning demo research, and prepping on the drive.

Phase 4: Facilitation (15 to 16) The two things I do use AI for in the room.

Phase 5: Delivery (17 to 20) Reading your sticky notes, and building the deliverable.

The four rules that make all of this work (21 to 24) Including the full Truth Prompt.

Two extras worth having (25 to 26)

The three data rules

The Workshop Deliverable Prompt The long one, in full. Built from four real client decks.

Every prompt from the video

Copy these straight into Claude or ChatGPT. Anything in [BRACKETS] is yours to replace.

A note on where these come from. Some of these are word for word what I said in the video. Others I only described out loud, so I've written them out in full here. Each one is marked so you know which is which.

Before you start: the project setup

Create a project for each client. Everything you do for them lives inside it, so you never re-explain the context.

Project name: the client name.

Project instructions: *(written out, described in the video)*

```
I'm a workshop facilitator supporting [CLIENT NAME] on [a full offsite / a
half-day session / a workshop series].

You'll help me across four phases: discovery, workshop designing,
preparation, and delivery.

Rules to follow in every answer:
- Only use information I've given you. Never invent facts, names,
  numbers, or quotes. If something is missing, ask me.
- No em dashes. Write in simple, direct language.
- Don't sugarcoat. If my thinking is flawed, say so and explain why.
- Ask me questions when the brief isn't clear enough to answer well.
```

Add your email templates, your deliverable templates, and any past documents you want it to copy the style of.

If you want the strongest version of those last two rules, swap them for the Truth Prompt (22) and paste it here instead.

Phase 1: Discovery

1. Prepare for the first client call

(word for word)

```
I'm going to meet the head of [DEPARTMENT] at [COMPANY]. Help me prepare
the meeting.
```

Let it ask you questions back. That's the point.

2. Get up to speed on their world

(word for word)

```
What are the most common challenges for a [DEPARTMENT] department of a
[INDUSTRY] company?
```

3. Get the questions you should be asking

(written out)

```
Based on what you know about this company and this department, what are
the 10 questions I should ask in a discovery call to really understand
their situation? Rank them by how much they'd change my workshop design.
```

4. The recap email after the call

(word for word, cleaned up)

```
I had a meeting with the client. Here is the transcript.

Help me write the email summarizing the main takeaways of the
conversation. Clearly document what the goals of the workshop are, what
the success criteria are, and what could be some of the red flags.

Only use information coming from the transcript. Don't add anything that
wasn't said.
```

Then check the output yourself. Anything internal, like your own list of risks, comes out before you send.

5. Teach it to write emails like you

(written out)

Drop 5 to 10 of your past client emails into a project first, with the sensitive information removed.

```
Here are emails I've sent clients after a first call. Analyze them and
create an MD file that captures how I write: my structure, my tone, my
sentence length, how I open and close, what I always include, and what I
never do.

I'll use this file as a reference for future emails.
```

Phase 2: Workshop designing

I don't let AI design my sessions. These two prompts are for pressure-testing what I've already designed.

6. Test an activity before you run it

(word for word, condensed)

```
[Paste the workshop context and goals.]

I want to kick off the workshop with [ACTIVITY NAME]. I'll interview
[WHO] for [X] minutes to capture the challenges they see.

If you were [that person], what challenges would you raise? Give me the
list you'd expect to hear, in their own words, short and concrete.
```

7. Same thing, with the activity explained

(word for word, condensed)

If the first answer misses, explain how the activity actually works:

```
Here's how the activity runs: [paste the instructions from your card or
your deck].

Now give me the list of [OUTPUT FORMAT, e.g. How Might We statements]
that would come out of it.
```

Then ask yourself the only question that matters: is this what I need at this point in the session? If yes, keep the activity. If no, change it.

8. Stress-test your full agenda

(word for word, assembled from the video)

```
Here's my draft agenda: [paste it].
Here's what we committed to the client: [paste the goals].

Evaluate this agenda against five things:
1. Outcome alignment. Will this realistically lead to the agreed outcome?
2. Timing. Is it feasible, or am I fooling myself?
3. Energy. Where will the energy drop?
4. Risks. Is there enough time to make real decisions and build
   commitment?
5. Prioritization. Every workshop runs long. If I lost 25% of the time,
   what would you cut?

Answer as a world-class facilitator. Do not sugarcoat your assessment.
Challenge my assumptions rather than accepting them. Prioritize truth
over reassurance.

Rate each of the five from 0 to 10 and explain the score.
```

9. Make it readable

(word for word)

```
Explain this to me like I'm 12 years old. Use simple words only.
```

Phase 3: Preparation

10. Build your workshop slides

(word for word, condensed)

```
Help me prepare my workshop slides.

Here's an example of a slide I use: [paste or attach one].

Do the same for [ACTIVITY NAME].
```

11. Write examples for an activity

(word for word)

```
I'm running a [ACTIVITY NAME] activity. Each person writes [WHAT THEY
WRITE].

Write me three examples from similar teams that would help participants
understand what's expected. Similar enough to inspire them, not so
similar that I put words in their mouth.
```

12. Examples from real companies

(word for word)

```
Now give me examples that real companies could have come up with using
the same exercise.
```

Then widen it:

```
What other industries face the same problems as [CLIENT]? Give me an
example from one of their direct competitors, one from a similar
industry, and one from an industry far away from theirs.
```

13. Research inspiration for a lightning demo

(written out)

```
I'm running a lightning demo. The challenge we're solving is [CHALLENGE].

Find me 8 companies that have solved a similar problem well. For each
one, give me:
- The company and what they did
- The one big idea worth stealing
- Why it's relevant to [CLIENT]'s situation
- What's different about their context

Avoid the obvious ones like Google and Apple unless there's a genuinely
strong reason. I want examples my client hasn't already seen.
```

14. Prep on the drive

(written out, described in the video)

Use voice mode for this one, in the car on the way to the session:

```
I'm facilitating a session tomorrow with the [DEPARTMENT] team at a
[INDUSTRY] company. Help me get deeper on their world.

Start with the biggest operational problems teams like this face. Then
how a department like this is normally structured. Then the best
practices. Then the quick wins.

Ask me one question at a time and go deeper based on my answers.
```

Phase 4: Facilitation

I don't use AI in the room. These two are the exceptions.

15. The sandwich method

(written out, based on Alexandre Eisenchteter's principle)

Human first, AI in the middle, human last:

```
My team just generated these ideas: [paste what they wrote].

Build on them. Give me [X] additional ideas that follow the same logic,
plus [X] that come at it from a completely different angle.

Don't rank them. The team will do that.
```

Then the humans react, vote, and decide. That last layer is never AI.

16. Turn the recording into next steps

(written out, described in the video)

```
Here's the transcript of the workshop: [paste or attach].

Pull out every action that was committed to. For each one give me the
action, the owner, and the deadline. Only include what was actually
said, and flag anything where the owner or the deadline wasn't clear.
```

Phase 5: Delivery

17. Read the sticky notes off your photos

(word for word)

Use incognito mode for this if the photos hold sensitive information:

```
Give me all the information that's written on the sticky notes in this
photo. Group them the way they're grouped on the wall.
```

18. Teach it your deliverable format

(written out, described in the video)

Load a project with 10 of your best decks, sensitive data removed:

```
Here are workshop deliverable decks I've made. Analyze them and create
an MD file capturing my template: the slide order, what goes on each
slide, how much text per slide, how I write insights, and my tone.

I'll use this as the reference for every future deliverable.
```

19. Build the deliverable deck

This is the big one, and it's long enough to deserve its own section. The full prompt is at the end of this document, under **The Workshop Deliverable Prompt**.

Short version of how it runs: fill in the brief, paste your raw material, check the palette and the mapping table it gives you, then let it write.

Review every line of copy before you ask for the file:

```
Generate the full PowerPoint.
```

Reviewing first saves you a lot of tokens and a lot of waiting.

20. Build them a tool

(written out, described in the video)

Check with the client on privacy before you do this one, and note that this needs a bit more setup than a single prompt. I use Claude Code for it.

```
Build me a simple OKR tracker for this team. It should hold the
objectives and key results we defined in the workshop, let them update
progress, and show where each objective stands.

Here's what we defined: [paste it].
```

The four rules that make all of this work

21. Give it context like a junior consultant

(word for word, expanded)

```
Before we start, here's my context:
- The goal of the workshop: [GOAL]
- The client: [WHO THEY ARE, WHAT THEY DO]
- Who's in the room: [PARTICIPANTS]
- What they want to walk away with: [OUTCOME]
- My facilitation style: [STYLE]

Tell me what else you need to know to do this well.
```

22. The Truth Prompt

(the full version of the honesty rule from the video)

In the video I give you one line of this. Here's the whole thing. Paste it into your project instructions once and it applies to everything you do in that project.

```
Follow these rules in every answer.

1. Be explicit when uncertain. If you don't know, say "I don't know."
   Never pretend to know.
2. Flag uncertainty. Use phrases like "Based on available evidence,"
   "This is an estimate," or "This may vary."
3. Label your sources. Make it clear whether your answer is based on
   established facts, scientific consensus, inference, reasoning, or
   opinion.
4. Ask for missing context first. If important information is missing,
   ask clarifying questions instead of making assumptions.
5. Separate facts from assumptions. Clearly distinguish verified
   information from educated guesses.
6. Avoid overconfidence. Never present uncertain or disputed claims as
   definitive facts.
7. Acknowledge disagreement. If experts or sources disagree, explain the
   different viewpoints fairly and summarize the evidence for each.
8. Correct mistakes immediately. If you notice an error in your response,
   acknowledge it and provide the corrected information.
9. Give honest, direct feedback. Don't tell me what you think I want to
   hear. Tell me what is most accurate based on the available evidence.
10. Do not sugarcoat. If my idea, plan, or reasoning is flawed, say so
    clearly and explain why. Prioritize truth over reassurance.
11. Challenge my assumptions. Point out biases, logical fallacies, weak
    arguments, or missing considerations that could change the
    conclusion.
12. Optimize for accuracy, not agreement. Your goal is not to validate my
    opinions but to help me reach the most correct conclusion possible.
13. Give the best answer first. Start with your most likely correct
    answer, then provide nuance, caveats, or alternatives if needed.
14. Be concise before being comprehensive. Lead with the direct answer,
    then explain your reasoning and supporting evidence.
15. If there's no single correct answer, say so. Explain the trade-offs
    and why reasonable people might reach different conclusions.
```

Rule 10 is the line I use in the agenda review prompt (8). If you only ever paste one line, paste that one.

23. Let it ask you questions first

(word for word)

```
Before you answer, ask me the questions you need to give me the best
result.
```

24. Show, don't just tell

(word for word, expanded)

```
Here are [1 to 3] examples of what good looks like: [attach them].

Match the structure, the level of detail, and the tone. Tell me what
you notice about them before you start.
```

Two extras worth having

25. Strip the AI voice out of the writing

(described in the video, written out here)

```
Rewrite this so it doesn't read as AI-written.

No em dashes. Use commas instead. No "here's the thing", no "let's be
honest", no "dive into". No three-item lists used for rhythm. No
sentences built on "it's not X, it's Y". Use contractions. Vary the
length of the sentences. Cut every word that isn't doing work.
```

26. Find the right amount of context

(word for word, expanded)

```
I want to give you the right amount of context for this task, not too
much and not too little. Tell me what you actually need to know, and
what would just be noise.
```

The three data rules

None of the above matters if you leak client data.

1. **Anonymize everything.** Company names, logos, people's names, figures, anything specific enough to identify them.
2. **Get consent before you use a recording.** Ask the client if you can record and put the transcript into an AI tool.
3. **Turn off model training in your settings.** And use incognito mode when you're handling anything sensitive.

The last prompt is long enough to need its own section. Here it is in full.

The Workshop Deliverable Prompt

Turn your raw workshop output into a client-ready deck.

You run a great session. The wall is covered in post-its. Then you sit down to build the deliverable and it takes you four hours, or you procrastinate for a week and send something thinner than the workshop deserved.

This prompt does the heavy lifting. You still make the calls.

How to use it

1. Copy everything between the two lines below into Claude, ChatGPT, or whatever you use.
2. Fill in the brief at the top. Takes five minutes.
3. Paste your raw material at the bottom: photos of the wall, your Miro export, your notes, a transcript if you have one.
4. It comes back with a palette and a mapping table first. Check them, then let it write.
5. Take the copy into your slide tool.

It won't design the slides for you. It gives you the structure, the copy, and the layout for each slide, which is the part that eats your evening.

A few things worth knowing before you run it:

- It will refuse to invent things. If your group never landed on a number, you get "TBD" and a flag at the end, not a made-up metric. That's deliberate. A deliverable with one invented figure in it costs you the client's trust in all the rest.
- The writing rules at the bottom are mine. Short sentences, no em dashes, no "let's dive in". Swap them for your own voice. Everything above them is structure and holds regardless.
- Colours always come from your client's brand. The prompt asks for the palette before it writes a word.

THE PROMPT

You are helping me turn raw workshop output into a client deliverable deck.

The deck is not a report. It's a mirror. The client should read it and recognise their own words, sharper.

The deck has a fixed spine. Everything between the spine is one slide per exercise, and you pick the slide pattern from the library below based on the shape of what the exercise produced.

1. THE BRIEF

```
Client name, and partner name if it's a joint session:
Team or department:
Workshop title:
Date of the session, and the date line for the cover:
Format (full-day offsite, half-day, four days, on-site, remote):
Who was in the room, teams or functions represented:
Why the session happened, in my words:
Exercises I ran, in order:
Named people who can be quoted, with job titles:
Client brand colours, or "pull from the logo":
Photos available:
Raw material: pasted at the bottom
```

2. WHAT'S FIXED AND WHAT VARIES

Always there, in this order:

1. Cover
2. Context
3. Goals (workshop goals, project goals, or both as separate slides)
4. Exercise slides, one per exercise, in the order they ran
5. Next steps
6. Thank you

Always true, whatever the workshop:

- The client's brand colours, never a palette of your own
- One slide per exercise, in running order
- The group's own words on every slide
- A facilitator's note wherever a result is still provisional
- Real photos from the day

Varies with the workshop:

- Everything between goals and next steps
- Deck length. A half-day gives you 6 exercise slides, a four-day gives you 15
- Whether you need section dividers and a table of contents. Add them past roughly 10 slides, or when the deck covers more than one distinct block of work
- Whether the deck has one accent colour or one per section

Don't hold a slot open for a slide the workshop didn't earn.

3. WORKSHOP TYPES AND THEIR USUAL SHAPE

Starting points, not rules. The exercises I actually ran always win.

Team strategy offsite
Diagnosis (E) → vision statement (D) → metrics (H) → obstacles (C or K) → benchmarks (N) → prioritisation matrix (J) → next steps by owner (R)

Product or portfolio strategy, multi-day
Divider (P) → vision (D) → purpose (D) → critical questions (K) → guiding policies (K) → divider (P) → target group (C) → needs (C) → goals and KPIs (I) → key issues (K) → divider (P) → team SWOT (F) → commitments as quote cards (L) → fun facts (M) → next steps (R)

Project kick-off, half-day
Project goals (C) → success criteria (C) → risks (C, two columns) → audiences (C) → lightning demos (N) → ideation output (C) → next steps as a list (R)

Cross-team alignment on a process
Shared definitions (D, one per slide) → scope mapping by category (G) → gaps and overlaps (E or K) → target process vision (D) → collaboration model and next steps (R)

Ideation sprint
Challenge framing (D) → inspirations (N) → ideation output (C, split across slides) → prioritisation matrix (J) → concepts or artefacts (O) → next steps (R)

4. SLIDE PATTERN LIBRARY

Pick by output shape, not by topic name.

A. Cover Full-bleed photo of the room, darkened. Title large and bold, with one word or phrase in the accent colour. A single line underneath: the date, or "Client x Partner, Month Year", or a positioning line like "From Vision to Action". Client logo top right, or both logos if it's a joint session.

B. Context Photo one half, text the other. Headline is either the word "Context" or a statement that captures the stake of the day in the group's own terms. Then 1 to 3 short paragraphs: when, who stepped away from what, why it mattered, what the days were spent on. Past tense, factual, warm.

C. Numbered list The workhorse. A stack of white boxes with thin borders, each with a big accent-coloured number (01, 02, 03) and one line of text. Use for goals, criteria, risks, audiences, priorities, anything the group produced as a flat list. Up to 5 items: single column. 6 to 8 items: two columns. One line per item, two at most. If items need a title plus a description, bold title then description underneath. Photo on one side if there's space. If the list runs long, drop the photo and use the full width. More than 8 items from one exercise: split across two slides with the same headline rather than shrinking the type.

D. Statement slide One sentence, centred, large and bold, with the load-bearing phrases in the accent colour. A small grey label underneath naming what it is ("Definition", "Our Purpose", "Our Vision"). Nothing else on the slide. Use for: definitions the group aligned on, a purpose statement, a vision statement, any single sentence the group fought over and landed. One statement per slide. Never two.

E. Two-column diagnosis Left column on a dark background, right on light. Two opposing questions as headlines ("What's working well?" / "What's holding us back?"). Each side grouped into 3 to 5 named themes, each a short noun phrase in the group's language, with 2 to 5 bullets underneath. Use for: start/stop, strengths/blockers, keep/change, any paired exercise.

F. SWOT grid 2×2, dotted borders, with a huge ghosted letter (S, W, O, T) watermarked behind each quadrant. Short bullets, 3 to 5 per quadrant, fragments not sentences.

G. Category columns 4 to 6 vertical columns, each with a coloured header and a rule underneath, then a plain bullet list. Uneven column heights are fine. Use when the group sorted a large volume of items into named buckets and the value is seeing the full spread.

H. Metrics tiles 2×2 grid of solid colour tiles, darkest to lightest. Each tile: one big number or percentage, then one line saying what it measures. Often paired with a vision statement on the left half. Only use when the group produced actual numbers. Never invent one to fill a tile.

I. Goals and KPIs pairing Two labelled columns side by side, "Goals" and "KPIs", each a numbered-box stack, aligned row by row so goal 01 sits next to KPI 01.

J. Impact / effort matrix Dark background. Vertical axis IMPACT, horizontal axis EFFORT. Every prioritised idea is a post-it placed roughly where the group put it. Each post-it: the idea in 1 to 2 lines, then "Owner: [name]" or "Owner: TBD". Keep the group's wording, shorthand and arrows included. Don't tidy them into clean sentences.

K. Grouped detail boxes 2 or 3 wide boxes across, each with a numbered bold title and a short bullet list inside. Use when the group produced a handful of themes that each need unpacking, not a flat list. Add a lead-in sentence above the boxes explaining what the group was answering. Continue onto a second slide with the same headline if there are more than 3.

L. Quote cards Grid of boxes, 3 across, 2 rows. Each: a small photo of the person, an italic quote in quote marks, then their first name in the accent colour with a role or nickname after it. Use for: personal commitments, inspirational statements, what each person wants from the next phase.

M. Fun facts Same grid as quote cards, but with in-jokes from the session instead of quotes, each ending in a hashtag. Only include this if the session actually generated in-jokes and the group would be comfortable seeing them in writing. It's the slide that makes people forward the deck.

N. Inspirations and lightning demos Numbered list where each item is a source name in bold, then one line on what they do. If the group drew a transferable lesson, add a line starting with The insight: underneath. Reference image or screenshot on one side.

O. Product or artefact showcase The thing itself, large, on a device mockup or plain. Short paragraph on the other side explaining what it is and who it's for.

P. Section divider Full-bleed darkened photo. Two or three words stacked on two lines, first line white, second in the accent colour, ending in a full stop. No other content.

Q. Table of contents Numbered list of section names, each number in a different section colour. Photo on one side.

R. Next steps Either grouped by owner (owner's first name as a coloured subhead, then their 1 to 3 commitments with a bold action name, a colon, and 2 to 3 sentences of what they'll do), or as a numbered list when the follow-ups belong to the group rather than to individuals. Always end with the collective items: reviewing the ideas that didn't make the cut, and assigning an owner and timeline to each prioritised idea.

S. Thank you "Thank you" large, with the final word or the full stop in the accent colour. Photo collage, 4 to 6 images, mixing working shots with human moments.

5. THE FACILITATOR'S NOTE

This is the detail that separates a deliverable from a transcript.

When a result is provisional, contested, or needs validating, add a short italic grey paragraph at the bottom of that slide, in my voice, saying so. What it does:

- flags that a brainstorm output still needs data behind it
- names the choice the group struggled with
- adds the point that came up, wasn't a goal, but is worth remembering
- says what the group didn't get to

Add it only where it's true. Two or three per deck is right. If every slide has one, none of them land.

6. MAPPING RULES

Before writing anything, produce two things and wait for my go-ahead: the palette you've derived from the client's brand, and a mapping table of exercise → slide pattern → headline.

- One exercise, one slide. If an exercise produced more than fits, split across two slides with the same headline rather than compressing.
- If two exercises produced the same shape of output, they still get separate slides. Don't merge them.
- If an exercise doesn't fit any pattern above, describe the slide you'd build and ask.
- If a pattern has no matching exercise, leave it out. Never add a slide because the library has one.
- Section dividers go before each block of 3 or more related slides.

7. WRITING RULES

Swap these for your own voice. The structure above holds either way.

- Use commas, not em dashes.
- Short sentences. A 12-year-old should follow every line.
- Contractions: don't, it's, they're.
- No filler openers like "here's the thing", "let's be honest", "the truth is", "dive into".
- Headlines are 1 to 4 words, bold, often ending in a full stop. Two lines maximum.
- Keep the group's vocabulary. If they said "money-driven", don't write "commercially incentivised". If they used an internal acronym, keep it.
- Bullets are fragments or short statements, never paragraphs.
- Keep the vivid concrete details, the specific examples and small observations. They're what makes the client believe the deck is theirs.
- Don't soften the uncomfortable findings. If the group said something blunt about themselves or another team, it stays blunt.
- Never invent a metric, a quote, an owner, or a next step. Mark it TBD and flag it to me.

8. DESIGN SYSTEM

- Colours come from the client, always. Before anything else, state the palette you'll use and where you got it: their brand guidelines if I gave them to you, otherwise their logo and website. Name the accent, the dark neutral, and any secondary colours. If you can't establish the palette, ask me rather than picking one.
- 16:9. Client logo top right on every content slide except covers and dividers.
- One accent colour for headlines and numbers, one dark neutral for body text, white background for content slides, darkened photos for covers and dividers.
- If the deck covers several sections, give each section its own colour from the client's palette, used consistently on that section's headlines and TOC number. Only when the palette has enough colours. A one-colour brand keeps one accent throughout.
- Thin rule along the top and down the left edge of content slides.

- Bold sans-serif headlines, large, left-aligned, generous space above them.
- Numbered boxes: white fill, thin grey border, number large and in the accent colour.
- Real photos from the day, never stock.

9. DELIVER

1. The palette and the mapping table first. Wait for my approval.
2. Then the full slide-by-slide copy, one section per slide, with the pattern letter noted and a line on which photo goes where.
3. At the end: everything marked TBD, every place where I need to check wording against what the group actually said, and any exercise whose output was too thin to build a slide from.

RAW MATERIAL

```
[paste post-its, notes, transcript, wall photos here]
```

Built from four real client decks across strategy offsites, product strategy sprints, and project kick-offs.

Before you go

That's everything. Use it, change it, make it yours.

If the video helped, a thumbs up and a subscribe genuinely make a difference to whether the channel grows. It takes you two seconds and it's the main thing that decides if I keep making videos like this one.

Tell me how you're using AI. I only covered what I actually do, and there's plenty I'm not doing. Drop it in the comments so the rest of the community can pick it up too. I read all of them.

Come say hello.

- More on facilitation: facilitators-corner.com
- The podcast, Another Day, Another Workshop: listen on YouTube
- The Workshop Deck app: theworkshopdeck.com

Let's design better workshops together, and let's level up as a community.

Mehdi