People + AI Guidebook Workshop

Workshop Facilitator's Guide

Introduction + Quick start

This document was created for facilitators planning a workshop. It is a companion to the workshop slides↗.

It was designed to be:

- **Action-oriented:** It was made to help teams put insights from the People + AI Guidebook↗ into practice in their products.
- **Remote first:** the workshop was designed to be run fully remote, using the workshop slides↗ and a video call. (It can be run in-person too.)

- **Customizable:** sessions can be customized for your team needs, from a focused 1-hour deep dive, to a two-day sprint. (We provide template agendas for the default 2-day version.)
- **Self-facilitated:** It's made for teams to be able to run on their own. Note that our facilitator materials assume basic knowledge sprint / workshop facilitation. For more on basic facilitation, check out:
    - Google's design sprint kit ↗
    - Google Ventures sprint resources ↗
    - Conversation Factory ↗
    - Control the Room ↗

Quick start for facilitators

1. Review the activities and assess what length of workshop / which activities make sense for your team.
2. Follow the steps in the planning checklist to prepare for your workshop.
3. Run your workshop!

Activities

Here's a quick overview of each activity:

Understand and define the space

If you are running a two-day workshop, these activities are typically run on Day 1.

Case studies

These hypothetical case studies help you step out of your specific product context and think about the implications of AI-based systems more broadly. Each scenario includes guiding questions and debrief discussion to help relate the scenario back to your product. More information on choosing case study scenarios below.

Opportunity statements

For the critical moment you've selected, you'll document a user problem, relevant Guidebook patterns and potential solutions. By the end, you'll have identified a set of opportunity statements to focus on for the targeted deep-dive activities.

Create solutions

If you are running a two-day workshop, these activities are typically run on day two.

If you are running these as one-off exercises, you as the facilitator will need to prep challenge statement, critical moments, and opportunity statements in advance.

Errors audit
You'll assess the existing and potential errors caused by your system and the consequences for the user. With that in mind, you'll develop plans for both preventing these errors and addressing them when they do occur.

Explainability audit
You'll work through a series of questions to critique the efficacy of your product's user-facing explanations. You will also do a writing exercise to create explanations that match your user's state of mind and knowledge gaps.

AI Onboarding
Guided by the question "How would a human behave if they were doing this task?", you'll work on ways to explain how the system works, along with its strengths and limitations, as you onboard new users.

Trust calibration
Trust needs to be earned and properly calibrated. You'll look for places in your product where the user might trust the system too much or too little and work through ways to help users properly calibrate their trust.

Controls audit
Automation is a spectrum and there are many cases where the user needs to maintain direct control over the system. You'll map the need for user control to the stakes and consequences of your system's actions, and brainstorm the right user controls to match the situation.

Feedback audit
User feedback, both implicit and explicit, is a critical part of an AI system continuing to learn and get better over time. You'll audit existing feedback mechanisms and find gaps where more or different feedback should be collected, and how it will be used.

Data headlines
Data collection, labeling, and maintenance is an often-overlooked but critical aspect of the design of an ML system. You'll write potential good and bad headlines to help make sure your data efforts are aiding in creating a human-centered AI product.

Review questions
After designing a number of solutions to your errors, explainability, control, feedback, and data problems, this section has you take a step back and review your solutions from the standpoint of user trust. Are you doing what is necessary to build and ship a trustworthy product that your users will appreciate?

Planning checklist

This checklist will help you prepare for the full two-day workshop. It typically takes 3-5 hours of work spread across several weeks to complete all the steps below.

See below for information on custom / modular workshops.

1-2 months out (or long enough to choose a date)

This is an estimated timeline. Give yourself enough lead time to prep the material and set a date with your team.

✅	What	Who	Resources & Notes
	Read the People + AI Guidebook	Facilitator	pair.withgoogle.com/guidebook ↗ Do this early, before you start prepping materials.
	Download the workshop slides	Facilitator	Download the slides and create an editable copy where your team can collaborate.
	Review the workshop activities and determine which version of the workshop your team will do	Facilitator	You can run the full two-day agenda or customize to your team's needs.
	Identify the challenge statement and critical moment(s) your team will focus on	Facilitator + key team members	Challenge statement examples Choosing critical moments
	Decide who will attend & pick a date	Facilitator	

1-2 weeks out

✅	Item	Audience	Resources & Notes
	Finalize agenda	Facilitator	Templates below
	Customize workshop slides	Facilitator	Customize the slides according to your agenda, delete slides that you don't need, delete the "Facilitator Notes" on each slide after reviewing and completing any actions.
	Choose case studies	Facilitator	Choosing case study scenarios The default agenda makes room for 2 out of the 5 case study scenarios. Choose which ones are most relevant, then delete unused case studies and debrief questions from your slides.
	Send prework	Facilitator	Ask participants to read the People + AI Guidebook patterns in advance of the workshop (~30 minute request).
	Decide on subdividing activities	Facilitator	Depending on workshop size, you may choose to break into sub-groups that tackle multiple opportunity statements or split up activities. Do this depending on the construction of your team. We recommend no more than 5 people per group. Note that even within one activity you might divide up to let each person work individually and then share back as a group. There's guidance for this in the slides.

After the workshop

✅	Item	Audience	Resources & Notes
	Gather solutions	Facilitator	During the workshop, your group will output a number of potential product solutions. Gather all of these up and document them according to feasibility and impact ↗.
	Further develop your solutions	Facilitator & core stakeholders	Go deeper on design and research activities to flesh out your solutions. See the modularity guide for more info.
	Share with your stakeholders	All workshop participants	Synthesize your findings and share them with your broader team.
	Run more workshops!	All workshop participants	Run the workshop again to solve a different set of problems in your product.

Agendas

Two-day agenda

Key
Whole group
Small group/solo work (If you have small groups)
Break

Day 1 (Understand the space + Find opportunities)

Assuming a default of 9am-3pm, but adjust accordingly

9:00	Arrival and workshop introduction (15)
9:15	Team introduction (10)
9:25	Case study introduction / Break into groups (5)
9:30	Case 1 (30)
10:00	Case 2 (30)
10:30	Break (15)
10:45	Critical moments (20)
11:05	Map guiding questions (20)
11:25	Write opportunity statements (35)
12:00	Break (15)
12:15	Share, discuss and choose opportunity statements (30)
12:45	Overflow and wrap-up (15)

Day 2 (Design solutions + Review)

9:00	Arrival, review opportunity statements / Split into groups (15)
9:15	Errors audit (45)
10:00	Break (10)
10:10	Explainability audit (40)
10:50	AI Onboarding (40)
11:30	Break/Stretch (5)
11:35	Trust calibration (25)
12:00	Lunch (60)
1:00	Controls audit (30)
1:30	Feedback audit (30)
2:00	Break (10)
2:10	Dataset checklist (20)

2:30 Review questions (30)
3:00 Large-group shareout, closing and next steps (30)

Options for shorter / targeted agendas

Here are some options for customizing the workshop to your team's needs and availability:

- **Do "Understanding the space"activities (aka Day 1) offline —** Work with a small group in advance to identify critical moments, explore Guidebook patterns, and write opportunity statements. This allows you to jump straight into the more detailed solution design activities.

- **Choose a subset of "Design Solution" (aka Day 2) activities —** Select specific modules that are most relevant to your opportunity statement(s). Depending on the activities you choose, you'll likely want to identify a challenge statement, critical moment(s) and opportunity statement in advance.

- **Skip the case studies or read them in advance —** The case studies are a great introductory activity. However, they are (purposefully) abstracted away from your specific product. If you feel your group is aligned well on the problem areas or have previous experience with these workshops, you can jump right into the activities.

- **Custom agenda example: 4-hour(ish) explainability workshop**
    - Scope critical moments and opportunity statements offline in advance.
    - Introduce your team and the challenge (30 minutes)
    - Explainability audit (40)
    - Break (15)
    - AI Onboarding (40)
    - Trust calibration (25)
    - Break (15)
    - Review questions (30)
    - Wrap-up (15)

Supplementing the agenda

Repeat workshops

In the full 2-day workshop, you'll end up narrowing in on some subset of your critical moments to develop solutions for. You can repeat all or a subset of the day 2 activities for any number of critical moments you like.

Team energizers

We've learned that full-day virtual workshops are mentally fatiguing. Building in team energizers can be a great way to build and maintain energy at the start and end of each day and after some of the breaks. We did not include these in the default agenda, but even 5 minutes at a time for some light stretching or a "get to know you" question for the group makes a big difference.

Lightning talks

Consider adding a series of short talks near the beginning of the workshop to provide additional context for your product to help get the team up to speed. Lightning talks typically cover things like prior research, technical constraints, competitive analysis, and business considerations.

Design and research activities

The workshop is scaffolded on the Design Sprint ↗ framework originally developed inside of Google Ventures. However, the workshop does not include many of the design and research activities that are a part of classic sprints, because these methods are not specific to ML-based design. You may consider adding design and research steps before, during, and/or after the workshop based on your needs.

Here are a few examples:

- Conduct user research before the workshop and hold a lightning talk with the findings to have a user-driven sense of the current state of your product.

- Add more in-depth brainstorming and design activities after activities such as the Explainability Audit, AI Onboarding, or Controls Audit to go deeper on designing full-fledged solutions.

- Build prototype designs and conduct follow-up user research for all of the ideas you develop within the standard workshop. This is highly recommended regardless of any other customization.

See the optional materials appendix in the slides to generate and/or gather ideas.

Additional planning guides

Setting up your workshop slides

The workshop is designed to be run entirely out of a single set of slides. You'll need to download the slides and set them up in a collaborative editing environment (e.g. Google Slides ↗) for all participants to participate in the workshop.

Here are instructions for setting up the slides in Google Slides, but you can repeat a similar process in your slides program of choice:

1. Download the slides.
2. Open Google Slides ↗.
3. Create a new presentation.
4. From the new presentation, do **File -> Import slides.**
5. In the resulting dialog, select the **Upload** tab.
6. Navigate to the file (Guidebook-Workshop-Slides.pptx) or drag it into the dialog.
7. Wait for the slides to upload.
8. In the top right of the dialog, click **All** to select all the slides.
9. Press **Import slides**.
10. Wait for the slides to import and start customizing your slides!

Refer to this help article on importing slides ↗ if you need more assistance.

Challenge statement

The challenge statement defines your goal and your scope to make sure the workshop produces actionable results. The challenge statement should include:

- What you're making (detailed designs, principles, directional prototypes, storyboards...)
- Who it's for (expert vs novice, a particular user group)
- When you're targeting launch (immediate release vs. long-term vision)

Here are a few examples to get you started:

Define principles and example product flows for helping our expert users feel confident to use automated features. Incorporate ideas around transparency, explainability, feedback, and performance. Output should inform our roadmap for the next year.

Design a product recommendations experience for Enterprise teams, focusing on building user trust in recommendations both before and after adoption. Target design ideas that can ship by Q3 this year.

Create a multi-year vision for onboarding new users by explaining model accuracy and exploring contextual signals to build confidence in the system. Ideas should set a 2-3 year direction for the product and not be constrained to immediate shipping priorities.

Critical moments

Choose up to 5 critical moments that will be used as the basis for evaluation of your current design and generation of new ideas throughout the workshop.

Critical moments are places in your product that represent a critical touchpoint between the user and your AI system (within the scope of your challenge statement). Think of these as times where trust in the system can be earned or lost. They might be areas of the UI or decisions/predictions your algorithm makes.

Here are a few examples you might consider:

Algorithmic recommendations
Confidence scores
Onboarding (explanations of how the ML system works)
Specific error messages
High-stakes automation controls
Account settings/preferences
Payments/purchases

Note that these critical moments assume you have an existing product that you're improving, but you can also choose expected or hypothetical critical moments if your product is still in development.

Case study scenarios

The case studies and discussion questions help you step out of your specific product context and first think about the implications of AI-based systems more broadly. Each scenario includes:

- questions that help you critically assess the scenario
- a debrief discussion relating the scenario back to your product.

There are 5 case study scenarios. Most teams run two of them. As the facilitator, you'll need to choose which are most relevant to your product and goals.

Here's a quick overview to help you decide:

Scenario 1: Good explanations and failure modes.
(This is likely a good one to choose for your first workshop.)

Scenario 2: User control over automation in high-stakes scenarios.

Scenario 3: Recommendation systems and personalization.

Scenario 4: Responding automation failures, Unintended and malicious use.

Scenario 5: Societal consequences of the technology.