

SME AND COLLABORATION ORIENTATION

EXPERT WORKSHOP

An expert workshop to select particular aspects

0. Name of the phase

SME and collaboration orientation

1. Name of the tool

Expert workshop (evaluation matrix)

2. Duration

2 – 3 hours

3. Materials used

Please mention if some are specifically for individual and group delivery or virtual delivery.

- Pens and markers of different colors
- A sheet of paper, minimum size A3, a whiteboard, flipchart
- Sticky notes and markers of different colors
- PC and TV or Presentation Canvas

4. What is this tool and what is its purpose and benefit?

An expert workshop (evaluation matrix) focuses on organizing a workshop of experts to evaluate ideas, concepts, prototypes, or other outcomes using an evaluation matrix and otherwise evaluate them. An expert workshop is applied to phases where evaluation and selection are made of more specialized elements and phases, where special expertise is needed, such as safety, technology, or science-related issues. Outcomes from customer and user contribution, for example at a co-creation workshop, can be merged with these. An evaluation matrix is a tool that can be used in an evaluation workshop to facilitate evaluation and selection. The matrix helps to compare different solutions and see which required elements should still be covered or improved.

5. Steps how to use this tool in practice

1. Select and invite experts for the workshop based on the aim and start preparing the workshop from premises and evaluation settings to sending invitations.
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2. Start the workshop by presenting its aim, practical issues, and what needs to be evaluated. Leave time for clarifications and questions on the issue of evaluation. Define the evaluation criteria together.
3. Start evaluation by creating the evaluation matrix. This can be created on a whiteboard, a flipchart, a big sheet of paper, or an electronic file. Add on the top of it the name of your project/what you are evaluating, and draw two axes and a matrix on the paper or a flipchart.
4. Add the solution alternatives on the other axis, for example, the vertical one, naming and numbering them, each on their own column. And add the criteria on the other axis, for example, the horizontal one. You can also add a score (preferably on a scale of 1-5) to each criterion depending on their appropriateness to the need.
5. Discuss and evaluate the solution alternatives and add on the matrix, for each of them criterion data on the respective row and under the respective solution alternative. You can write this data on paper/whiteboard or on sticky notes.
6. Once ready, look at the matrix and see which solution alternative fills in the most and the most important criteria. If you have used scoring, you can use this to help in the process.
7. Discuss and evaluate the solution alternatives further. You can, for instance, highlight the important aspects and spot elements that are weak or still missing.
8. Make a memo of the development points and other important issues for further development.

6. Tips and hints for using this tool

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