

## What to Include in Your Facilitator Toolbox

Traveling to client sites with a facilitator toolbox makes a good impression. Consider our checklist of items for both onsite and virtual presentations. You can customize or edit this document to add your own list of tools.



### Checklist

| ✓  | Item                               | Notes  |
|--|------------------------------------|--|
| <b>Onsite Facilitation (Such as a Client Meeting or Live Presentation)</b> |                                    |  |
|  | <b>Presentation equipment</b>      | <ul style="list-style-type: none"> <li>● iPad, Chromebook, PC or laptop</li> <li>● Mouse &amp; mousepad</li> <li>● Backup battery pack</li> <li>● HDMI cable</li> <li>● USB Thumb drive</li> <li>● <a href="#">Mini power travel strip</a> or double-slot USB charger</li> </ul>   |
|  | <b>Backup of your presentation</b> | You may have slides, docs or photos on your laptop, but it's a good idea to keep a copy on a USB stick, or email docs to your client in advance.   |
|  | <b>Pens &amp; Markers</b>          | <ul style="list-style-type: none"> <li>● Sharpies (for sticky notes, best if they're unscented)</li> <li>● Mr. Sketch (thick dark colors for flip charts)</li> <li>● Whiteboard Markers (non-permanent, easy to wipe off)</li> </ul>   |
|  | <b>Paper Tools</b>                 | <ul style="list-style-type: none"> <li>● Post-It notes (good for participant input, prioritization)</li> <li>● Colored dots or stars (great for voting on flipchart)</li> <li>● 3x5 Cards</li> <li>● Notepad: Lined or graph paper to capture action items</li> </ul>  |
|  | <b>Other Tools</b>                 | <ul style="list-style-type: none"> <li>● Tape: Painter's tape is best to prevent damaging walls</li> <li>● Scissors</li> <li>● Laser clicker or pointer</li> <li>● Fasteners: Mini-stapler, binder clips</li> <li>● Ziplock bags: The gallon size can hold many of these items)</li> <li>● Portable Post-it Flipchart table-top easel: In case client lacks one</li> </ul> |
|  | <b>Emergency items</b>             | Depending on your needs, you may want to keep a backup pair of glasses, lip balm, comb, and other essentials in your toolbox just in case.   |
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| Virtual Facilitation (Such as a Webinar or Video Presentation) |  |
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| <b>Backup Equipment</b>  | An extra laptop and phone come in handy when delivering a virtual presentation in case your main PC fails.   |
| <b>Tech Tools</b>  | Also, consider: <ul style="list-style-type: none"> <li>• Extra-long phone cable to stay charged throughout the session</li> <li>• Second monitor to facilitate app sharing or messaging</li> </ul>           |
| <b>Audio Tools</b>   | <ul style="list-style-type: none"> <li>• Headset to provide high-quality sound vs laptop audio</li> <li>• Logitech HD video camera with integrated microphone</li> </ul>                                     |
| <b>Lighting</b>  | Do your best to recreate professional studio lighting so that you're not blurry or appear to be in a dark room. A table or overhead lamps work fine.   |
| <b>Helpful Items</b>   | <ul style="list-style-type: none"> <li>• Folding laptop stand to prevent your PC from heating up</li> <li>• Wristwatch, timer or small folding clock to keep track of time</li> <li>• Mini-tripod</li> </ul> |
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You may want to label items with your name and address in case they're left behind.

### Our Contributors

We wish to thank professional facilitators [Esther Kim](#) and [Aneta Marcheva Key](#) for their contribution of photos and insights to this checklist.