

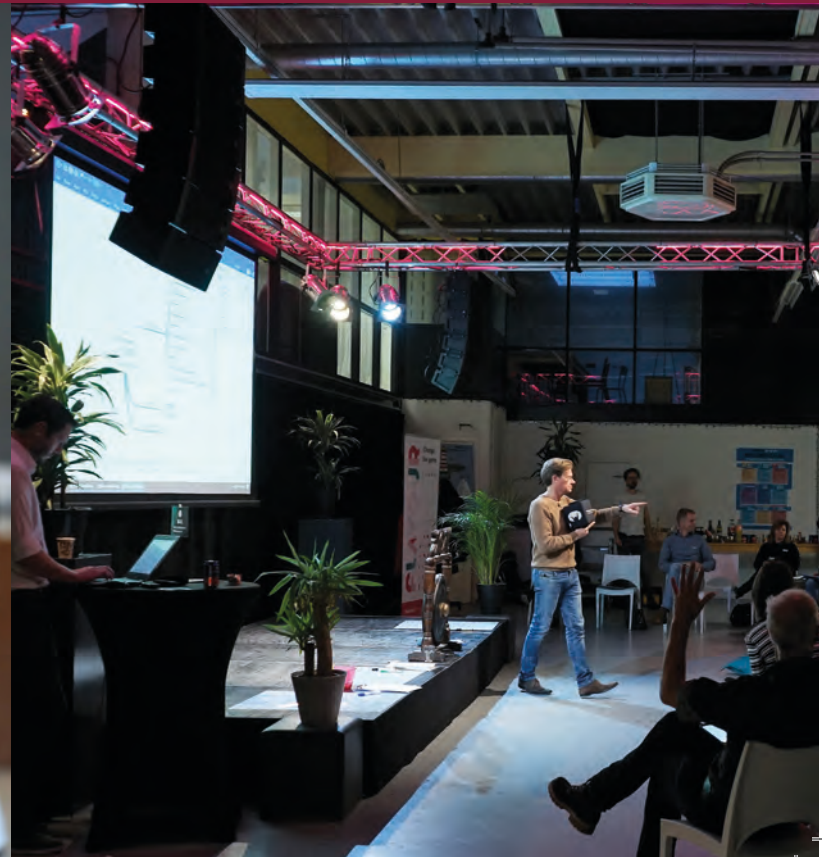
Getting Started

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GRAPHIC FORMATS: START WITH THE RIGHT STRUCTURE

The Power of a Good Format.

Visual Language and Drawing



GRAPHIC FORMATS: START WITH THE RIGHT STRUCTURE

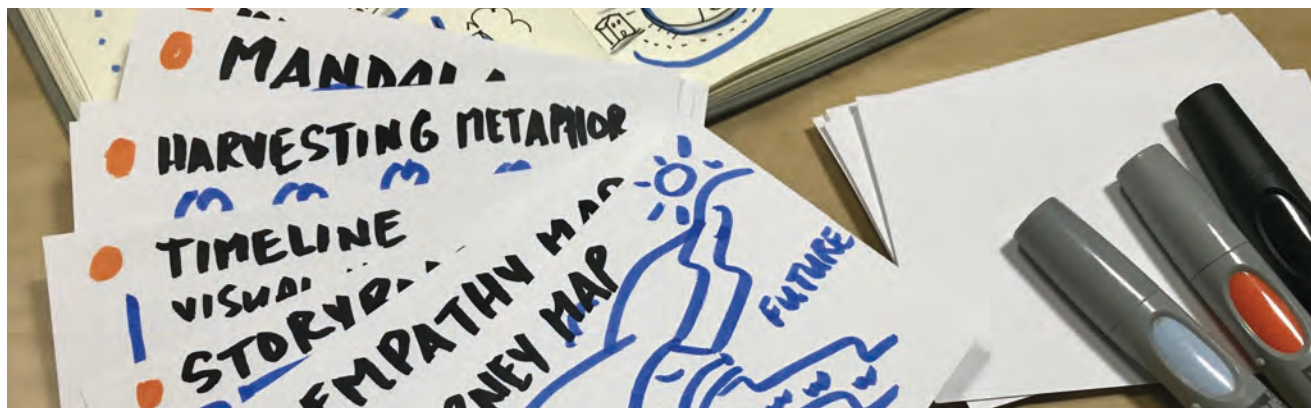


Image 1: Having a selection of graphic formats in your toolbox, whether in physical or digital form, adds value to the conversation and the facilitation.

Organizations and teams use visual formats all the time to move ideas and conversations forward. A look through any business presentation will reveal basic process maps, timelines, flow charts, and more, all representing a range of communications. These models are employed to help tell a story about data, people, and processes, thereby gaining insights into larger questions about strategy, culture, and principles. This helps a group get from where they are to where they want to be. As visual facilitators, we can take these familiar visual frameworks out of the confines of the slide show and dry document packet, and transform them into a series of compelling and dynamic graphic formats to support our clients and teams through a single meeting, or a larger process of organizational change.

Maybe it is your experience that in many sessions there is an overemphasis on the data, logic, and analysis. Getting groups working collaboratively, making drawings and stories on large sheets of paper or filling in digital format templates, brings in physical, emotional, and social engagement. Whether you work as a change facilitator or a graphic recorder, digitally or on paper, a foundation in the variety and application of graphic formats will support

your work with clients and events and help create a cohesive narrative throughout the process.

Tim's Graphic Formats Card Deck

When I meet with a client, I bring along a basic visual facilitation tool kit. Aside from a handful of markers and a clipboard, I also bring a series of cards with various graphic formats, process tools, and templates of graphic formats that can be filled in with the group. During the discussion, I listen and draw and create various sketches on whiteboards or paper to reflect what I heard, including the client's challenge, their current situation, what they hope to achieve, and possible solutions. Next, I bring out the cards and templates with the various formats, discuss how each format can fit into the context of the discussion, and together we work out a storyboard for their event or meeting. Clients love actively participating; excitement builds as they begin to visualize their event taking shape. Be sure to bring a few blank cards to sketch out ideas for additional graphic formats (or other tools) on the spot.

CHOOSE THE RIGHT FORMAT

Whether we call them a container, guide, map, structure, template, or schema, graphic formats help to shape and contour the story that emerges from a conversation. They give structure to our listening, clarify arguments in a dialogue, help us understand complexity, and facilitate the free flow of ideas. When chosen with purpose and intention, formats lend clarity and legibility to both the process and the product of the work.

Different stages in a larger change process require different types of thinking, and the graphic formats we use can support a design process across all stages. We'll dive into the specifics of these formats in a moment, but consider the following examples:

- When building a team, you might start with a blank page and build a *cluster map* of roles and activities.
- When brainstorming about the objective or mission of the team, use a *mandala* or *concept map* to explore underlying connections.
- When moving into the planning stages, you will use formats like a *timeline* or *decision tree*.

Before choosing your format, think about the following:

- What is the outcome we want to realize?
- Which 'thinking steps' will lead us there?
- What did we (or others) learn the last time we did this?
- What is the experience we want the group to have?
- Will this format serve the needs of the target audience and the conversation?
- Will it help us to listen in a particular way? Is the process clear?
- Will it help us see what is not being mentioned?

- Can it easily be shared (digitally) with other (not present) members of the target audience?
- How does it link together the steps in the process?
- Is it self-explanatory, or does it need an introductory description?
- Before selecting which graphic formats will best serve your client, take a moment to apply the Think-Decide-Do-Learn¹ model. Following these guidelines will clarify your objectives. In turn, the best-suited graphic formats will reveal themselves.

THE THINK - DECIDE - DO - LEARN MODEL

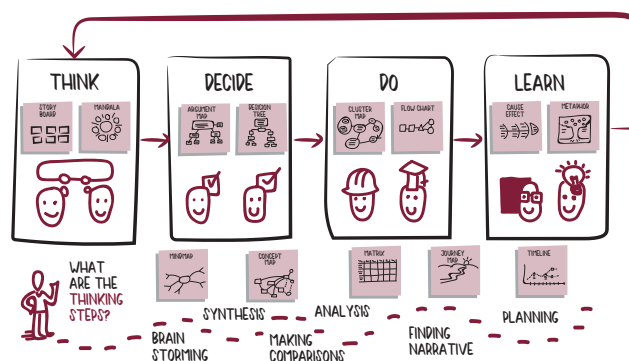


Figure 1: The Think-Decide-Do-Learn model, including suggestions on where and how to use some of the graphic formats.

WHETHER PLANNING A HOLIDAY OR REVAMPING A COMPANY

If you are planning a family holiday, you begin with the big picture and ask questions like:

- Where do we want to go? What are our main destinations, as well as the smaller points along the way?
- What are the ideas each family member has about the destination and trip?
- What are the key experiences we want to create?

¹ To help participants understand complexity and stimulate reflection, learning, and continuous improvement, *World of Minds* developed the Think-Decide-Do-Learn model. This model works when designing a single session or a series of sessions. On the book's website, we present real-life cases with detailed explanations of what to do in each step. For more about *World of Minds*, see www.worldofminds.com.

Then you gather information about various destinations, transportation, and costs, and begin to put together some options. After considering alternatives, you select and book the accommodation, travel, and tours. You pack your bags and the right accessories for the beach or the mountains, and make your way to what will (hopefully) be a very memorable family holiday. Once back home, you sit down to look at the photos and reflect on the experiences, the most memorable takeaways, and consider what areas you might improve for next time.

The same approach can be used during an organizational change process. The four stages in this process are *Think*, *Decide*, *Do*, and *Learn*. We call this the Idea Realization Cycle.

When deciding which format to use in a session, ask yourself, “What are the ‘thinking steps’ that I need to take to realize the objectives of the session?” Thinking steps include brainstorming, analysis, synthesis, comparing, exchanging arguments, observing, or giving meaning to a story. While some formats will fit more clearly into this framework than others, this gives you a starting point: based on the stage in the process and the specific objectives of the group (and each phase), which format should you select? Do this for each thinking step, as well as for the session as a whole.

When deciding which format to use in a session, ask yourself, “What are the ‘thinking steps’ that I need to take to realize the objectives of the session?”

Let’s talk about each phase in a little more detail.

During the *Think* phase you *begin with the end in mind*. What are the objectives of the session? Big-picture thinking and ideation support visioning, as do individual and group brainstorming. *Journey metaphors* and *concept maps* might support these thinking steps. We can also expand on the discovery process to identify relationships and connections, harvest data, and re-think and regroup ideas. *Process maps* and *storyboards* help us to think through plans and build scenarios.

During this phase, it is also important to reflect on what you learned the last time you worked with this group (or with similar formats). Consider the research that has been done in the particular field, as well as any other learnings you might apply during this stage.

In the *Decide* phase, we evaluate alternatives generated in the thinking phases. We identify solutions, weigh applied values to each alternative, summarize key points, and agree on the steps to take during the next phase (the *Do* phase). Graphic formats that support decision making include *argument maps*, *decision trees*, or expanding the *matrix* with pros and cons for each alternative.

During the *Do* phase, we execute the session using the chosen formats, and observe the group dynamics and remarks while using these formats.

In the *Learn* phase, we harvest the learnings, observations, and outcomes. What might these observations mean? What can we learn from them? What should we do differently the next time we’re in the same setting?

We often use a number of different graphic formats to help us realize the outcomes of one session. For example, brainstorm the 5W+H,² then lead the group through a *process map*, followed by a *decision tree* or *timeline*. Considering these options in advance helps to realize the overall objective of a number of sessions. For example, we might move through a collection of sessions by going from a *mandala* to a *storyboard* to a *timeline* to a *project dashboard* and, finally, to lessons learned.

² The 5W+H stands for the basic questions: *who, what, where, when, why, and how*.

JERRE'S REASONS TO GO DIGITAL

Maybe you're comfortable working with large sheets of paper. But what about digital – working with computer, projector, and screen? When I started *World of Minds*, I moved from conducting single sessions to supporting and accelerating change processes. My team and I suddenly worked for and reported to a multitude of stakeholders. We needed to get them on board, make sure they felt heard, find a way to 'empty their brains,' facilitate their creativity, and all work together without any misunderstandings. We had to:

- Come up with a method that quickly allowed us to capture input; structure data; combine, analyze, and synthesize the material; add relationships and tags to the collected information (to filter out different viewpoints and report what happened in each session); and to keep stakeholders engaged.
- Help stakeholders understand the (complexity of the) change process and their individual, corresponding roles.

Because of these challenges, we selected live digital mapping.³ Using different graphical

formats (sometimes in combination with paper or electrostatic sheets—which can be stuck anywhere and act as an impromptu whiteboard) helped us to quickly process and check input during the session. In this way, we ensured that participants felt heard. We were also able to report to all stakeholders within hours of the session's end.

In my experience a digital format:

- Can be used as a design for a single session, or a series of sessions;
- Serves as a template to complete (together) with the group;
- Can be created on-the-fly and adapted quickly to whatever is needed in the process;
- Is easy to share, making it very practical when the recording needs to be shared with a larger audience.



³ For more on live digital mapping, see the chapter entitled *Live Digital Mapping*, also by Jerre Lubberts.

FREQUENTLY USED FORMATS

Besides those mentioned below, there are many other formats and visual templates you can use to support a wide variety of team processes. Many are outlined in other chapters of this book.⁴ Each format we feature here has its own logic. We invite you to familiarize yourself and become more fluent in these formats. With familiarity, you'll have the power to improvise, creating your own modifications of these formats to best suit your clients. When a particular format doesn't seem to fit, always come back to your initial objectives and the needs of the group. Here we go!

MIND MAP

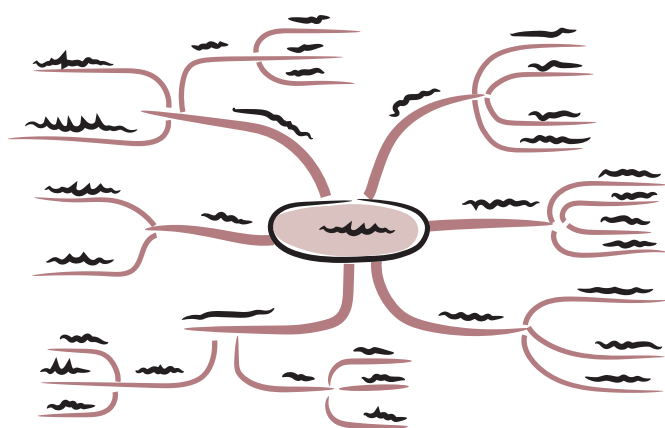


Figure 2: Mind Map

What is it?

A visual representation of ideas connected to a particular subject. Like a tree or neutron they radiate out from the center into main topics and subtopics, revealing an overall structure and relationships. A mind map represents the branches or pathways that emanate from a central idea or subject.

When is it used?

Mind maps can be useful in many contexts; for brainstorming, planning, meeting minutes, and organizing ideas around a theme. They are effectively

used to generate ideas and new insights, to structure information, to analyze problems, to get an overview (the big picture), or to formulate a strategy. According to Tony Buzan,⁵ mind maps stimulate creativity, problem-solving abilities, and memory.

How is it used?

Mind mapping is done by clustering information and breaking down large chunks into detailed pieces, adding relationships, color, and informational tags (icons or pictures).⁶ There are three ways to build your mind map.

- Start with a *blank slate* (brainstorming from scratch);
- Begin with predefined branches, providing a *structure* (for example, the 5W+H, as described earlier);
- Chart information as it flows in a *chronological order*.

You can also use a combination of the three ways of mind mapping: for example, start with chronological, then transform to a 5W+H (structure); or start with a blank slate, and then transform to a *process map* (structure). Before transforming a chronological mind map with multiple parts (like a conversation, for example), you might want to color-code the various elements to help transform it into a structure. You might use brown for information, green for goals or objectives, red for pitfalls or risks, and blue for next steps. In addition to helping ease the transformation process, this also stimulates your creativity and memory.

We invite you to familiarize yourself and become more fluent in these formats.

⁴ See Lynn Carruthers' *The Joy of Templates*; Jill Greenbaum's *Coaching with Templates*; and Dana Wright Wasson's *Creating Impactful Employee Engagement with Templates*.

⁵ The concept of mind mapping was first introduced by Tony Buzan. For more, see www.tonybuzan.com.

⁶ For more on mind mapping and other clustering methods, see the chapter entitled *The Value of Visual Organization*, by Brandy Agerbeck.

ARGUMENT MAP

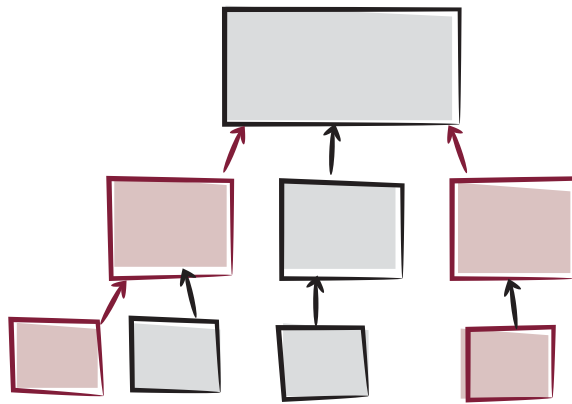


Figure 3: Argument Map

What is it?

An argument map illustrates the consequences of two (or more) courses of action. The map follows each pathway to its logical conclusion, including the rationale for one course of action over another, visualized across various levels.

When is it used?

Sometimes the sense-making process is an exercise in choices. Should we do this, or should we do that? Visualizing the choices helps groups to see what their possible decisions look like, as well as illustrating the process of the decision itself.

How is it used?

For groups that are far enough along in their conversations to make decisions and commit to a certain path or direction, the argument map can be instrumental in helping them to understand the liabilities and assets of moving in an intentional direction. For the argument map to be most useful, however, the two (or more) pathways need to be distinct, clear, and offer a definitive point of view.

DECISION TREE

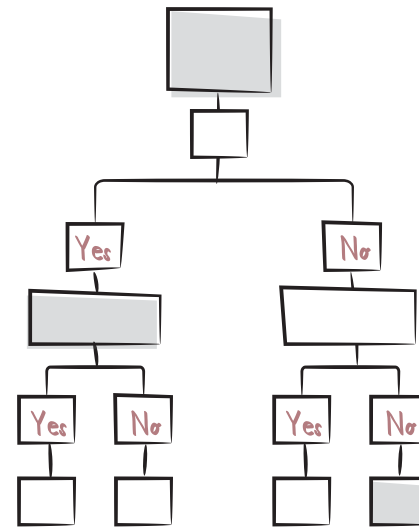


Figure 4: Decision Tree

What is it?

Often used together with the argument map, the decision tree supports decision making, and documents the steps needed to carry an idea or initiative to its conclusion.

When is it used?

A decision tree identifies the necessary checkpoints on the path to a decision, or clarifies actions and milestones that are required to move something from concept to prototype to action. It provides an objective map for looking at a landscape of alternatives.

How is it used?

It shows groups what they need to do to make a decision or bring an idea to fruition. As a decision-making tool, the visual representation needs to clearly represent the distinct and particular ways in which a decision is made or an idea comes to life—steps, milestones, actions.

TIMELINE

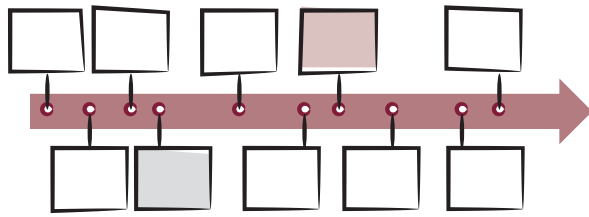


Figure 5: Timeline

What is it?

A timeline shows a linear, chronological progression of an idea, process, or initiative. The timeline can be historical or future-oriented.

When is it used?

By chronologically plotting and discussing the implementation and motivation of an idea or initiative (and the concepts behind it), the group comes to better understand the process and the theory of change.

How is it used?

When we identify markers of time (years, months, quarters, etc.) and plot milestones against them, we develop a deeper understanding of how quickly change happens, incrementally and systemically. We also see how change occurs amidst the constellation of a variety of events, whether they are institutional and organizational, political, social, economic, or cultural. Timelines can go beyond chronological markers to include social, economic, political, and other factors influencing change.

CAUSE/EFFECT DIAGRAM

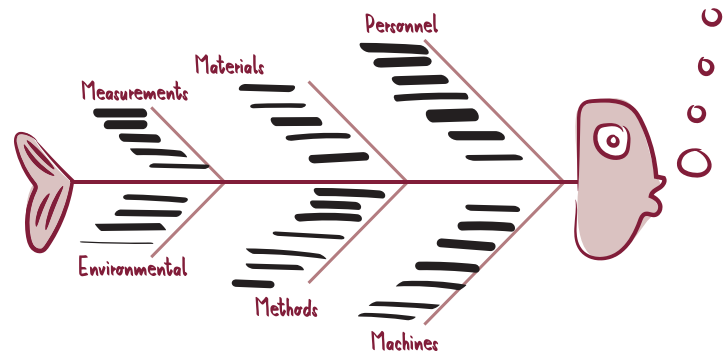


Figure 6: Cause/Effect Diagram
(also called an *Ishikawa* or *Fishbone* Diagram)

What is it?

People often jump to conclusions. Taking time to find the root cause of an issue can help prevent future problems or unwanted situations. The cause and effect diagram helps to identify, sort, and display possible causes of a specific problem, situation, or quality characteristic. It illustrates the relationship between factors that influenced an outcome or led to a specific situation.

When is it used?

You can use it to structure causes leading up to a specific effect, defect, problem, or situation.

How is it used?

Ask participants to describe and identify the problem; this forms a problem definition. Then brainstorm all possible causes, grouping and naming them along the diagram, starting with the backbone and then connecting the groups in sequence. The finished diagram will reveal (in one image) the complexity of causes and sub-causes leading up to the final effect.

CONCEPT MAP

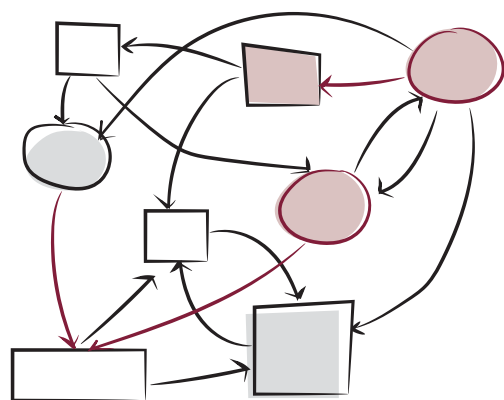


Figure 7: Concept Map

What is it?

A concept map is a dynamic and organic representation of an overall system, highlighting relationships through threads of connection. It allows participants to see the system in its entirety, as well as the impact of each component on the whole. By labeling the threads of connection, the system becomes enlivened and annotated. We're able to see the factors or players that contribute to or affect others.

When is it used?

Understanding a complex system can be difficult without some form of visual representation. A concept map draws out connections in the underlying structure, giving a clearer picture of the constellation of factors at play. Understanding the *now* gives participants a great starting point for change.

How is it used?

We start by defining the playing field or situation, its boundaries, and actors. Then we connect all actors with each other, describing their relationships in terms of strengthening or weakening. By adding bubbles, arrows, anchors, and annotation, the concept map will portray a view of the present. Tip: be sure to include a variety of impact zones so that the concept feels full, rich, and current.

PROCESS MAP

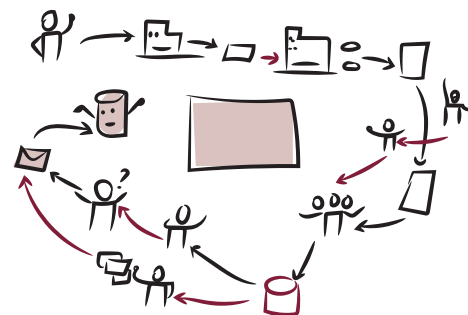


Figure 8: Process Map

What is it?

“A process map is a simplified graphic representation of a process.”⁷ A process is a succession of tasks, activities, and performances for the creation of products or services, which are directly connected with one another and, in their sum, determine the business management, technical production, technical administration, and financial success of an enterprise.⁸

When is it used?

When a process is poorly structured or understood, the efficiency of the intended end result can be undermined. A process map serves to initiate a further and more intimate understanding of a complex process. This format is often used to help people understand the process before taking part in it (onboarding), to fine-tune a process already in place (honing), or to uncover why a process isn't leading to a desired result (finding problems).

How is it used?

Start by asking the people who are involved in the process to describe their part, and then list and describe the necessary steps and surrounding conditions. Depending on the type of process, participants might also be asked to describe risks, resources, roles, and other important information. This information is then gathered into one process map to illustrate the big picture. The finished diagram helps the group understand the whole process and, therefore, assists as they make decisions to remove or combine steps.

7 For more information on visual process maps, see the chapter entitled *Understanding Business Processes through Visualization*, by Frank Wesseler.

8 Striening, *Prozess - Management*, p. 57.

MANDALA

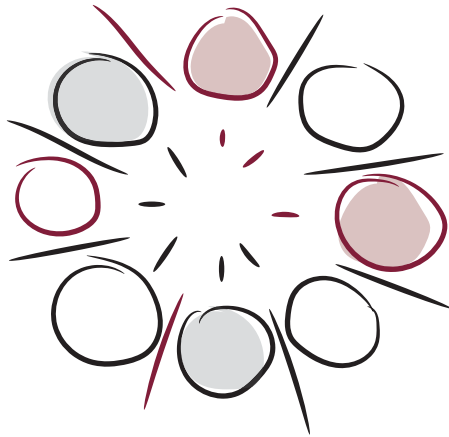


Figure 9: Mandala

What is it?

The mandala (which means *circle* in Sanskrit) is characterized by a circular format and a central axis point. The circle implies inward and outward movement, and includes rings radiating from the center. The mandala can serve to create a narrative around a central theme, as well as highlight relationships between tangential elements.

When is it used?

Mandalas can be useful during conversations in which groups are seeking deeper knowledge and truth about their own system or ‘container,’ or when they wish to determine how their work fits within a greater ecosystem. This format brings value to team introductions and team-performance conversations by clarifying individual contributions in the context of the bigger-picture objectives. In strategy development, values clarification, competitive analysis, and mission or vision work, mandalas can provide a contextual understanding of a system. This allows a team or group to see itself in relationship to other elements, and as part of the whole system.

How is it used?

Mandalas are useful in many group settings. For example, a mandala can illustrate a particular universe, such as a team, organization, or ecosystem. The mandala can map elements of a system while providing more understanding about the unified whole. Mandalas can also be used to map more intangible concepts, such as *wisdom* and *energy*. Create a *circle of wisdom* outer layer on the team mandala to map out how wisdom is defined, acquired, shared, and distributed.

CLUSTER MAP

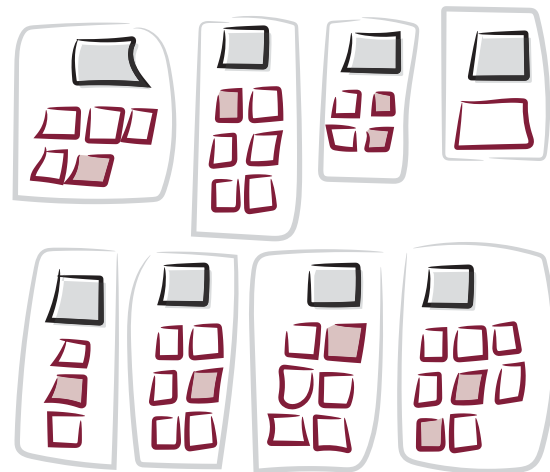


Figure 10: Cluster Map

What is it?

A cluster map is exactly what it sounds like—clusters or groupings of information or data around common themes or topics. The clusters help to make sense out of large amounts of data, and help focus, organize, and categorize thinking. Similar to affinity maps, the cluster map helps to identify possible nodes (or buckets) of data that can be mined later for insights and action steps, and to stimulate new patterns of thinking.

When is it used?

Clustering is used primarily as a data-gathering, sorting, and categorization activity. What are the subtopics around a main topic? What are the details around each of the subtopics? Whether you are

brainstorming, exploring a topic or idea, or trying to understand the points of convergence within a field of data, a cluster map can provide a useful structure.

How is it used?

During an ideation process or brainstorming session, it is helpful to create clusters (with sticky notes,⁹ for example) by grouping similar ideas together and then naming the clusters afterwards. At other times, it works better to pre-chart subtopic headings around a main topic in the center, and then solicit details and ideas around each of the subtopics. Additional subtopics can be added as presented by the group's discussion. Cluster maps may also be color-coded in order to highlight and differentiate each of the subtopics.

METAPHOR

A picture paints a thousand words, and a metaphor paints a thousand pictures.



Figure 11: An example of a visual metaphor to reflect harvesting ideas

What is it?

A metaphor is a figure of speech in which a word or phrase is applied to an object or action to which it is not literally applicable—something symbolic of something else.¹⁰

When is it used?

Metaphors can serve as the guiding frame for a conversation. Popular metaphors often feature natural elements, like landscapes (mountains, rivers, cliffs, etc.), journeys, gardens, trees, icebergs; mechanical elements, like machines and vehicles; and human elements, such as the brain, body, and nervous system.

How is it used?

If you want a central image to guide the conversation, a central metaphor can be pre-charted. Alternatively, a metaphor might emerge naturally from a brainstorm or ideation session. Once it reveals itself, the metaphor can be named and explored visually and contextually. Sometimes, the conversation might revolve around testing the metaphor to see if it helps the group to understand a difficult concept. The group might visually prototype a number of metaphors to assess the merits—and learning—of each one. In most circumstances, it is good practice to allow the metaphor to emerge from the group. As the facilitator or visual scribe, one should refrain from imposing a metaphor. It may not feel authentic to the story of the group, and it may derail them from their storytelling¹¹ around their data or content.

*In most circumstances,
it is good practice to
allow the metaphor to
emerge from the group.*

⁹ For more information, see the chapter *Using Stickies To Create Exciting Ideas and Engaged Participants*, by Dana Wright Wasson.

¹⁰ For more on metaphor, read the chapter entitled *The Metaphor in Visual Practice*, by Sophia Liang.

¹¹ For an example of metaphor-gone-wrong, see Anthony Weeks' chapter entitled, *Is Your Metaphor a Box or a Catalyst?*

JOURNEY MAP



Figure 12: Journey Map (also known as a Road Map)

What is it?

A journey map (or road map) is a form of visual metaphor. As the name implies, it represents a journey from one reality or experience to another. Implicit on any journey are milestones or progress steps, challenges and obstacles, and comparisons between current reality and future visions.

When is it used?

As one of the more preferred forms of visual metaphor, you might use this when you want to inspire your audience with a narrative. More specifically, a road map is a useful metaphor to convey change across time, highlight milestones, or identify interim targets. It can be applied to processes like strategic visioning, change initiatives, learning journeys, visualizing agendas, training programs, and customer journeys.

How is it used?

Similar to the guidelines on metaphor noted above, a journey map is best applied when it comes from the group itself. Explore the metaphor in conversation with the client as you discuss their needs. In one way or another, many organizational initiatives are like a journey. Sketch it out and discuss the format, along with other aspects of the initiative.

We have also used this metaphor as a central organizing idea behind strategic conversations, to introduce the idea of change in a visual format.

MATRIX

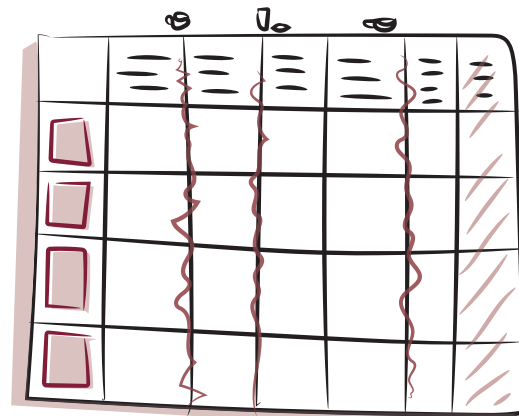


Figure 13: Time Block Agenda Visual Matrix Planning Tool

What is it?

A matrix is a grid diagram with two (or more) categories in columns and rows to create a series of combinations.

When is it used?

Great for evaluation and decision making across all possible combinations of the multi-category criteria. Use a matrix for comparing and analyzing information, mapping data, forcing analogies, and organizing team tasks.

How is it used?

First, create clear categories for the rows and columns. A suggestion when working with groups is to use sticky notes to work through each item in the grid, making combinations and re-ordering criteria according to group consensus. We frequently use this format when discussing the agenda for a multiple-day event, with agenda items as the columns and time blocks as the rows.

STORYBOARD

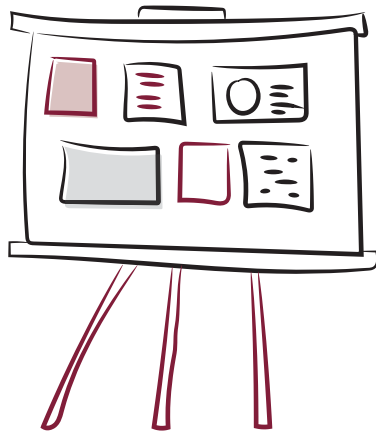


Figure 14: Storyboard

What is it?

Most people are familiar with the format of a storyboard,¹² perhaps through experience with movies or cartoon panels, where the artist presents a story in a sequential, time-based manner, one panel at a time. This creative approach allows the storyboarder to zoom in and out as dictated by the story, highlighting specific details or showing the overall picture.

When is it used?

It is a versatile tool that works with almost any communication media. Presentations, meetings, change processes, training programs, sales processes, and mapping out a pitch can all benefit from the storyboard. A kanban board is a storyboard-inspired project management tool that reflects a group's *to-do*, *doing*, and *done* lists. This entire book was initially mapped out as a storyboard, with sticky notes pasted on large sheets of paper. Eventually, the notes were incorporated into an online project management tool called *Trello*.¹³

How is it used?

The key to storyboarding is the sequential process. Sticky notes and storyboards make great creative partners. Start with a stack of sticky notes (or sheets of paper). Get groups to brainstorm one idea

per sticky note, post them up, then play around with the sequencing until it feels right. Next, add visual elements to clarify each step. Add connecting elements, such as arrows, to the surrounding process to highlight relationships and thinking.

CREATE YOUR OWN GRAPHIC FORMATS

Sometimes specific initiatives require specialized solutions. Each of the formats above can be modified to meet the specific requirements of your event. You might want to venture out and create your own formats. Your page is a blank canvas; nevertheless, it is guided by certain understood rules of perception, process, and structure.

Consider these guidelines and suggestions when modifying a graphic format, or when designing your own:

1. Left to right movement shows progress over time.
2. Lower placement on the page can suggest processes and how-to steps, while higher placement implies visions and big-picture thinking.
3. A grid is the underlying structure in every map or navigational tool.
4. Create visual emphasis for your main idea by using size, color, location, and contrast.
5. Different sides of an argument can be visualized at different locations: left and right, or top and bottom (of the page).
6. Metaphors (like a compass, clock, or scales for balance) can add layers of meaning to your formats.

¹² The storyboard is also discussed in the chapter entitled, *A Bulletproof Process to Creating Sketch Videos*, by Matthew Magain.

¹³ For more about *Trello*, trello.com/en-US.

**IN CLOSING:
START WITH THE RIGHT STRUCTURE**

Think of the bigger picture of what you want to achieve in your client engagement or meeting. Now see that big picture as a series of images: visual formats and tools, each carefully considered to meet the specific needs of your engagement. Incorporate your knowledge and experience in facilitation and learning design with the insights you learned from your last job (or from other facilitators); now map these out as a storyboard. Together with your client, you have just designed the

framework for an engaging event (or series of events) using visual facilitation tools and graphic formats.

Whether you are designing a single meeting or a larger series of sessions, using the Think–Decide–Do–Learn model when choosing graphic formats will give you a visible, tangible structure to design, deliver, and follow through with an engaging and valuable event.

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