

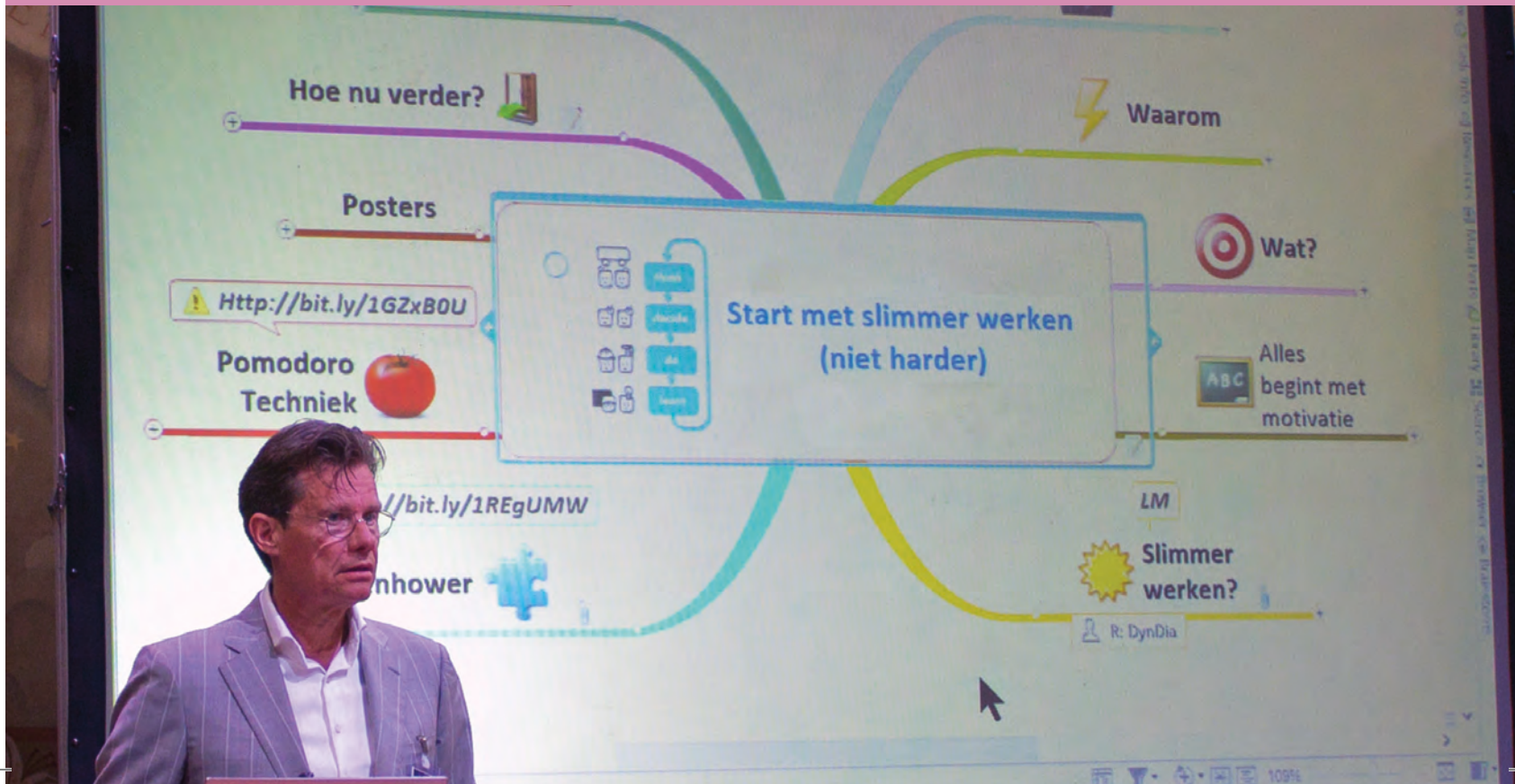
Beyond the Paper

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LIVE DIGITAL MAPPING

Unlock the power of diverse thinking by digitally visualizing complexity, step-by-step.

Virtual and Visual



LIVE DIGITAL MAPPING

Live digital mapping (LDM) is a process in which a group of people interactively build a visual representation of their thoughts using digital tools, like a computer, software, scanner, tablet, stylus, and so on. The *live* aspect emphasizes that as people speak aloud, a picture (consisting of key words, tags, pictures, relationship arrows and so on) is jointly built on the screen. Moving step-by-step and checking with the group to confirm that the correct key words were chosen, the facilitator can make sure that all participants feel heard and become more aligned.

When the goal is to accelerate a change process over multiple sessions, LDM serves as a powerful tool.¹ Participants are key to realizing the team or organization's goals—and they will feel more motivated to change. As a facilitator, your task is not only to stimulate creativity, but also to ensure that people feel safe to contribute, and that their time is well spent. With thorough preparation, smart design of the process, and your experience, you will find great success with LDM. You can ask the questions nobody asks; help to choose the correct wording for participants' ideas, worries, and objections; and visualize how these challenges will be addressed in the solution (for example, as a road map, decision tree, or argument map). Live digital mapping can be combined with manual mapping² and other methods of visual facilitation, as well.



Image 1: Live digital mapping with a facilitator and live mapper.

THE DAY LIVE DIGITAL MAPPING WAS BORN: PART ONE

Quite a few years ago I was challenged by top management to come up with a plan to merge a group of thirteen small-sized companies. Our company had recently been acquired, and the main shareholder wanted to realize economies of scale. I interviewed all the managing directors and, after five interviews, I started to feel quite uncomfortable and uncertain in my ability to succeed. The people I interviewed shared with me many arguments against merging the companies. It became clear that they were not motivated to cooperate. If I could demonstrate a solution that would benefit the organization, the directors, and their teams, I might have a chance to succeed with this assignment. I had to find a way to convince them to merge their companies. And if I didn't want to mess up my first assignment—and I wanted to keep my job—I had to come up with a solution *fast*. On this day, the idea for *live digital mapping* was born. (Want to know what happened with the thirteen companies we had to merge? You can read it at the end of this chapter.)

THE POWER OF DIGITAL MAPPING IN TEAMS

Much visual facilitation work (as described in this book) is completed on large sheets of paper. Live digital mapping, because of its electronic nature and virtually infinite canvas size, offers a different approach. Here are some advantages, as compared to paper-based visual facilitation.

¹ For an example, see the article entitled “High Performance Team Roadmap” included on the companion website of this book.

² For more, see the chapter entitled, *The Case for Digital Facilitation*, by Holger Nils Pohl.

During the Session

- **Digital mapping offers speed and flexibility.**

You can harvest a lot of information in a limited time. The facilitator can quickly add to and change both content and structure, and easily restructure the visual maps in the moment. This way, participants can respond instantly to changes.

- You can choose from **many standard graphic formats** (see the chapter *Graphic Formats*) and multiple options of visual-mapping software. Filtering information is easy, so you can **process large quantities of information**, and structure and restructure it quickly. As the amount of information grows, you can make specific information visible (or invisible) by using tags.
- You can instantly add tags and markers (icons or colors); at any moment, you can filter out different views of the same information (more on this later).
- It is easy for people to **participate virtually** (in real time) via the internet.

After the Session and During Implementation

- It is easy to **link supporting digital material** like documents, images, and websites.
- The facilitator can use their chosen software to seamlessly **translate the results into action**, using lists; planning charts; and personal, project, or team dashboards. By sharing the digital map online, those working virtually from remote locations can be accommodated. One can **share the results easily and quickly in digital ways** (such as PDF, Microsoft Excel, and HTML).
- Because of the vast amount of information that can be stored and digitally distributed, people who were not at the meeting can be **easily introduced to the results**.

COMBINING DIGITAL WITH PAPER

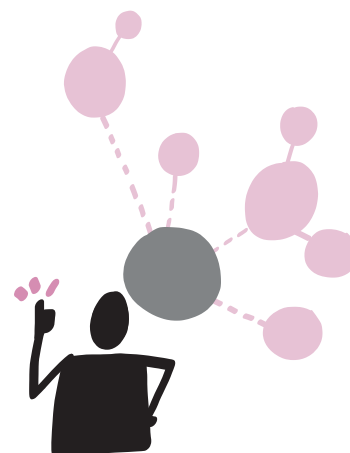
In some situations, using paper in combination with digital has significant advantages. When people get out of their chairs, they become more creative and engaged. In the brainstorming and thinking phases, specifically, this technique works very well. For example, with a large energy company and bank, we designed a paper- and electronic-based method to increase the number of ideas in the ideation stage, while not losing anyone during the steps of the process. (We call this *Concentric Brainstorming*; see the companion website for a more in-depth explanation of this process.)

TEAM PROCESSES THAT LDM CAN SUPPORT

LDM is suited for all kinds of sessions held with a team or group of people. The most common types of sessions that I facilitate include brainstorming, project startups, defining a strategy, problem-solving, business process-improvement, knowledge sharing, online meetings, visualizing the big picture, lessons-learned, and stakeholder mapping.

USEFUL GRAPHIC FORMATS

There are many formats from which to choose when live digital mapping a session. In the *Graphic Formats* chapter of this book, you will find the most frequently used formats of LDM, together with other graphic formats. The formats I use most often are the mind map,³ concept map, timeline, and process map.⁴



³ The concept of mind mapping was first introduced by Tony Buzan; see tonybuzan.com.

⁴ To learn more about graphic formats, read the chapter *Graphic Formats* by Tim Hamons and Jerre Lubberts.

THE LDM PROCESS, STEP-BY-STEP

There are three roles during a live digital mapping session:

- **Session designer**
- **Facilitator**
- **Live mapper**

Step 1: Design

During this step we address key questions: What should the outcome be? How does the session relate to the previous and upcoming sessions? How can our reporting support the participant objectives?

A brainstorm is a different type of session than a strategy session. A process-improvement meeting is not the same as a gathering to share knowledge or solve a complex problem. Defining the objectives will help determine the design.

Step 2: Facilitate

During the session, the facilitator and live mapper work together to make sure every participant feels heard. They check that the group's input is represented correctly on the visual map, including relationships and other informational categories. Here are key tips from my own experience:

- If you use a mind map, **state the objective and place the target audience at the center of the map**. As a discussion trails off or falters, the facilitator can point to the center of the map to help participants stay on track.
- If a portion of the invited participants are not present, instead of using key words and ambiguous drawings on your map, **write small phrases**. This will help those who are not present to understand the report of the session better.
- Another good practice during a brainstorm is to mentally (and visually) exit the chosen level of

the brainstorm and **try to think of a higher-level concept**. Add a new starting point left of the original center featuring the higher-level concept (see Figure 1). In this example, we started with the concept, “clean up seawater at local beach,” and after some brainstorming, we choose the concept, “control pollution entering the sea.” This way, we got a much broader viewpoint.⁵

- When the focus of the session is more on ideation than problem solving, you might want to use additional drawings or key words that trigger new trains of thought. In a session where you need to solve a (wicked) problem as quickly as possible, use key words or small drawings; connect them with arrows to clearly outline relationships (like cause and effect).



Image 2: Manual mind mapping on paper.

- When taking notes on paper, always **use a pencil** with an eraser so you don't have to think about the correct spot, spelling, or drawing. You can correct it later. Take time after the meeting (together with your conversation partner) to go through the map. Finish it by correcting any errors and putting everything in its rightful place. Use colored pencils for highlighting, grouping, or to code specific categories of information.
- When a mind map represents the **outcome** of a brainstorm, **add an empty branch or a branch with dots**. People who look at the map later will be challenged to continue thinking about the issue. It's an invitation to come up with more ideas to fill the empty spot.

⁵ This is an example of a *concept map*, a lateral thinking technique of Edward de Bono. For more information on this project, see *Litter at the Beach* on our companion website.

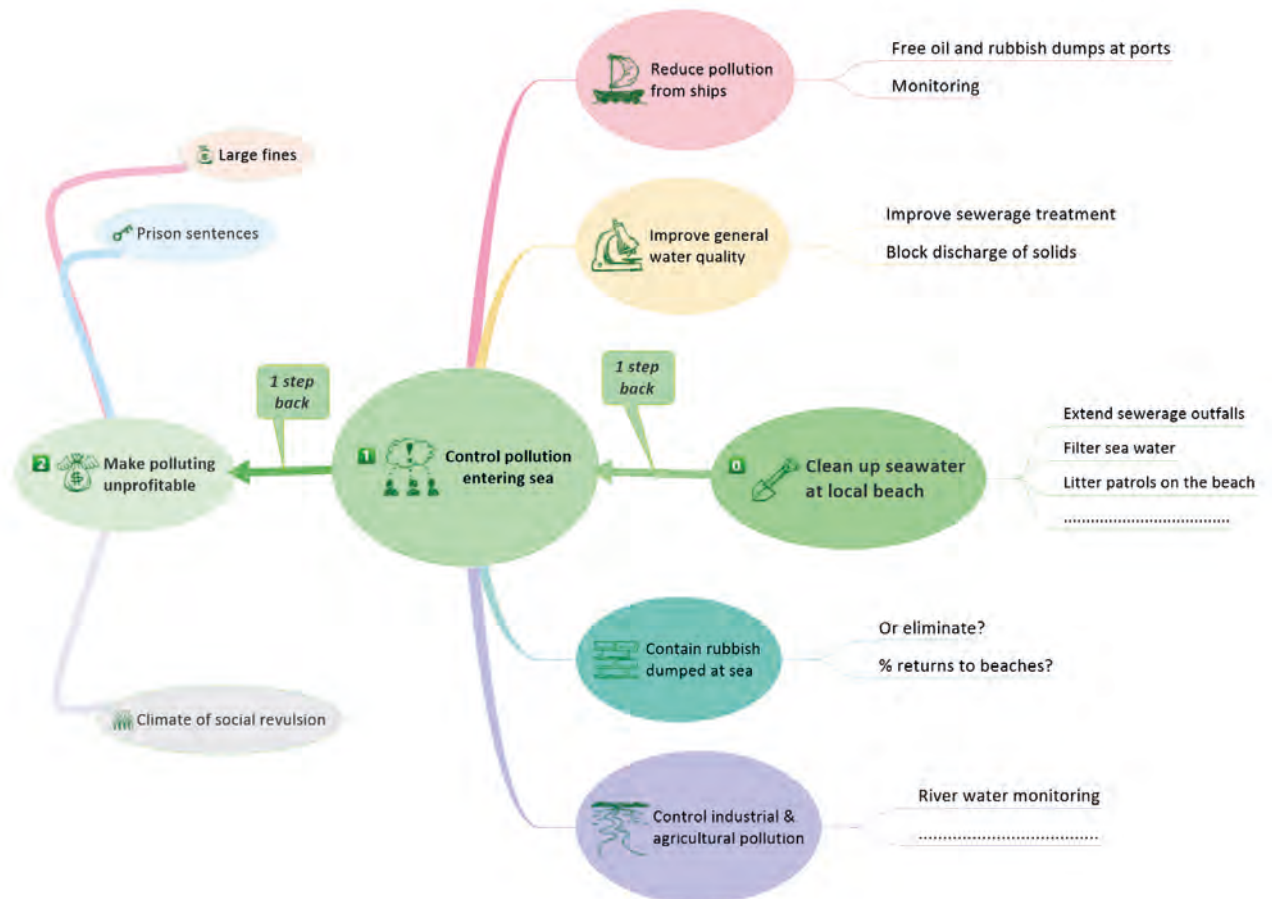
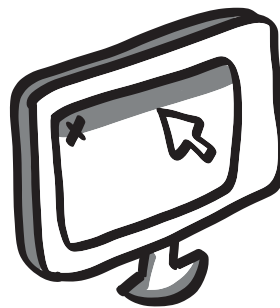


Figure 1: Concept mapping allowed us to exit our initial level of brainstorming —as you can see in the green *one step back* branches.



Step 3: Live Mapper: Make the Report

Here you inform participants and other stakeholders about what happened, what you expect (feedback, homework), and the proposed next steps. It is important that participants recognize the digital map they built during the session. With smart software tools,⁶ you can generate a report resembling the one they saw during the session, and add space for comments, incorporate mouse-overs and click-throughs, and add links to websites or downloadable files.

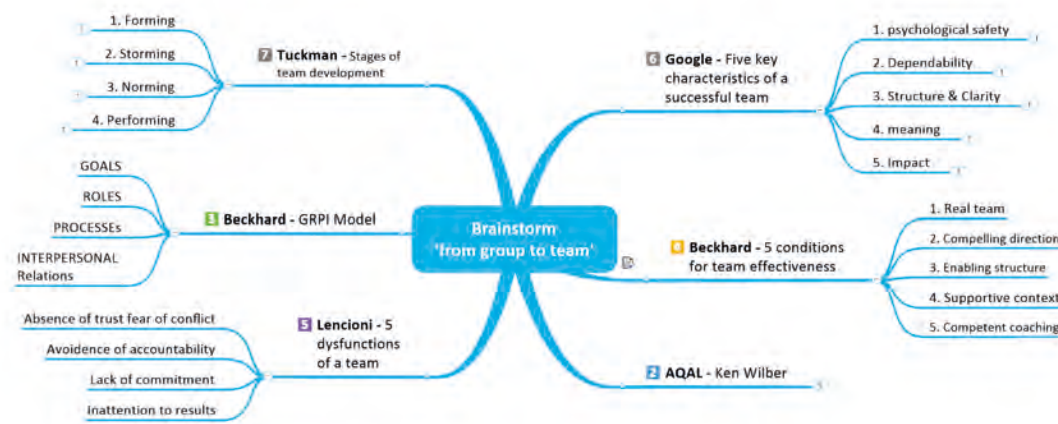


Figure 2: Example of a mind map directly after an LDM session.

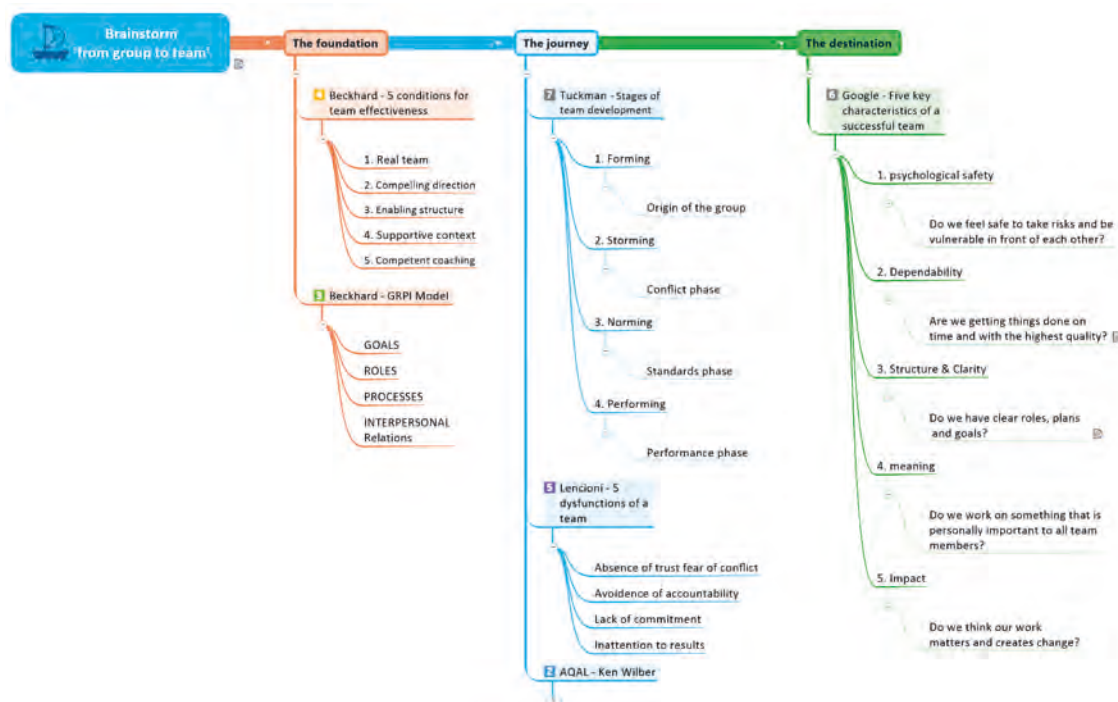


Figure 3: The same mind map as above, shown here after restructuring the information.

⁶ A few of my favorite mind mapping tools include *MindManager* (www.mindjet.com/mindmanager), *iMindMap* (imindmap.com), *XMind* (www.xmind.net), and *MindMeister* (www.mindmeister.com).

SHARED VISUAL LANGUAGE FOR OWNERSHIP AND FILTERING INFORMATION

When working with digital maps, a shared visual language can be very helpful for two reasons. First, people tend to take ownership if they can come up with their own pictures of relevant central elements. (These elements might include decision, boss, knowledge, worker, client, or process steps.)

Second, these images can be helpful when filtering information from the map. Every icon with a common meaning can be used to tag information. You can use these to analyze, synthesize, and explore different views and thought patterns. Also, they can be used to quickly generate reports (see Figures 4 and 5).

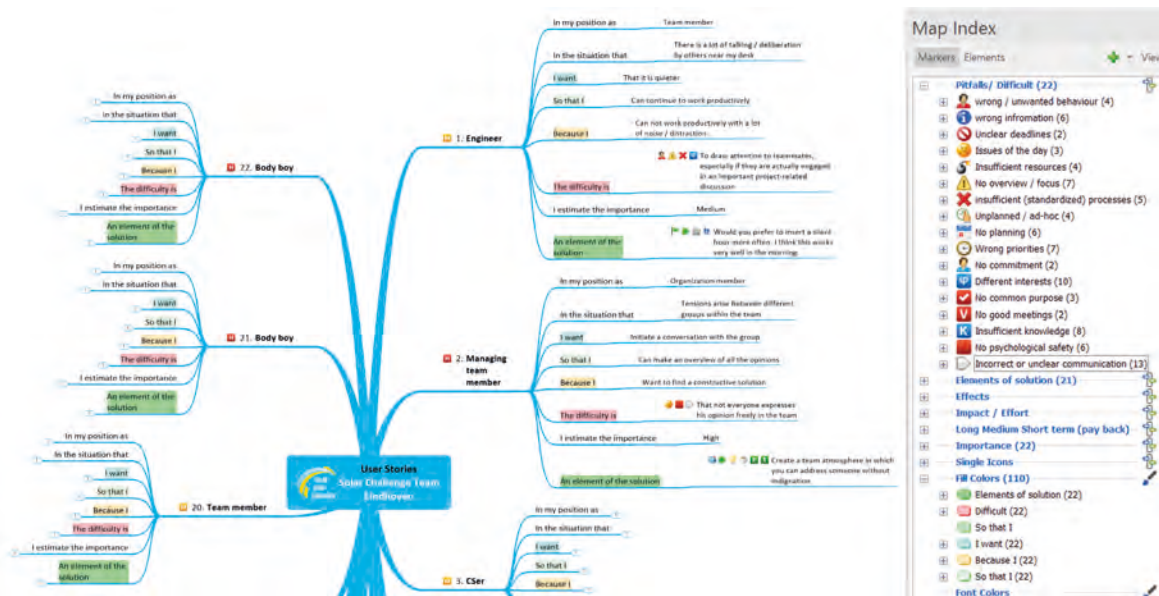


Figure 4: Mind map in which stories of team members have been tagged (using icons and colors) before filtering.

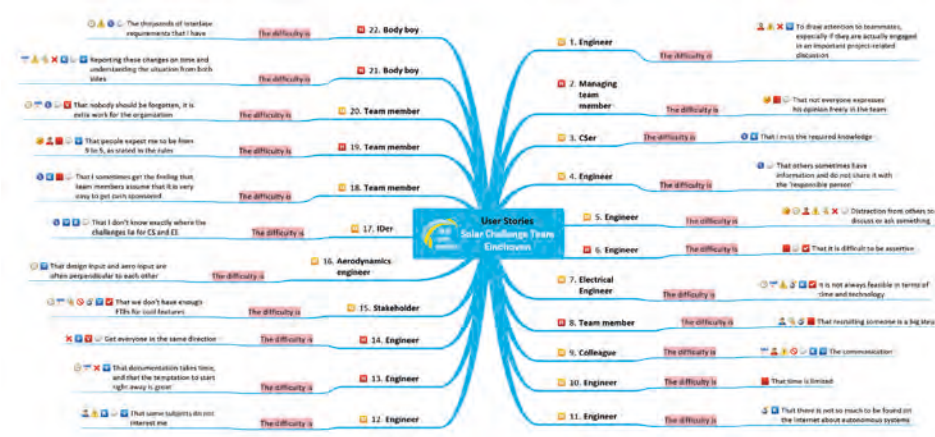
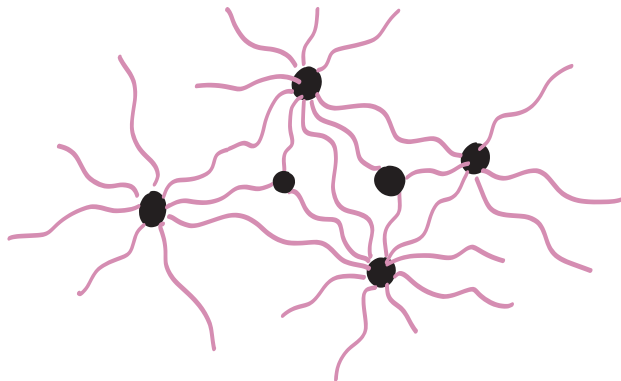


Figure 5: The same mind map after filtering out one of the tags ('the difficulty is').

CHOOSE THE RIGHT TOOLS

Mind mapping software is evolving into a category that offers many additional types of visualizations (other than mind maps). This is why some manufacturers use elaborate names for their products, like visual-mapping software, information-mapping software, or business-mapping software. This category of software offers a world of possibilities when trying to interactively visualize complexity during meetings.

When comparing functions, you will quickly lose yourself in an overwhelming world of possibilities. We designed a model to help you choose the best functions based on your objectives.



IN CLOSING

In the world of digital facilitation, live digital mapping is a continent of its own. It can be used individually or with large crowds, and it's flexible enough to work with almost all other methods and techniques. In this chapter we've only scratched the surface of these possibilities. (More information can be found on the book's website.)

THE DAY LIVE DIGITAL MAPPING WAS BORN: PART TWO

So what happened with the thirteen companies I had to merge? Wondering if I lost my job? After carefully analyzing the added value of each one of their companies for our clients, I asked the directors to join me in a session. In one of my first mapping sessions, we started a discussion during which we visualized their concerns on the big screen. I asked repeatedly, "Did I draw (or write) that correctly for you? Do you see a relationship with what the others said?" Through this session, I discovered two main reasons for their resistance to change. They feared a loss of autonomy, and they lacked insight as to how they could stand stronger together.

After uncovering these issues (using live digital mapping), I facilitated their discovery of the synergy and added value of all the individual companies. I asked them to come up with a proposal for the board, in which they could keep *their* autonomy, secure the added value for the client, and open up new territories and interesting fields to develop new products and services. The result of this work was that I didn't lose my job. I did, however, get a more complicated assignment. . . .

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