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VISUAL STRATEGIES & ENVIRONMENTS FOR FACILITATION

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PD21B Beyond Words: Visual Techniques for Facilitators

PD126E Visual Environments for Change

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Imagery is an essential link in the human capacity to think, converse, reflect, and create. Whether it is in the form of spoken metaphor or visual symbol, imagery allows us to communicate, engage, and inspire. For this reason, throughout business and community organizations, people are exploring ways to incorporate visual thinking — particularly a specialized professional practice commonly called graphic facilitation.¹

At the heart of this approach are two interactive processes: recording and strategic conversation. Recording is usually defined as capturing a conversation on large pieces of paper in a way which allows all present at a meeting or workshop to simultaneously see and work with what has been contributed. In strategic conversation meeting participants focus on the key ideas and significant questions related to their work or organization. ² Graphic facilitation weaves the two processes together in a continuous cycle — generate, capture and reflect — enables individuals with diverse thinking styles to work together with greater synergy and effectiveness.

Visual language, diagramming and metaphor are essential parts of graphic recording. Simple images, colorful printing, and thoughtful listening quickly transform group conversation into a tangible working document, commonly called the group memory, meeting chart or display.

While flip charts capture the content, “working big,” as visual practitioner Susan Kelly³ states, “helps people literally see the big picture and connect the parts with the whole.” Consequently most visual practitioners work on large sheets of paper (4'x8'-15') hung on the wall. The group memory provides a shared work space; the large size making it easy to organize, read and locate information.

With the group memory, participants track progress and update absent colleagues. Because people can see what has been said and “piggy-back” on existing comments, redundancy is reduced, quality is deepened, and efficiency is increased. Key ideas are retained for later use.

Images, which capture important ideas, often become icons, and take on a life of their own. Most importantly, the recording process generates new thinking – literally stimulating the cognitive process – as well as producing the shared, public record.

In organizational consulting work where I have used strategic illustration, the immediacy and clarity has led to more rapid dissemination of strategy and a benchmark by which to measure progress towards results.

Cynthia Scott, Senior Partner,
Changeworks and co-author of
Rekindling Commitment

Active involvement of both facilitator and participants is critical to realizing the full benefits of recording and visual strategies. Working directly with the recording, participants and facilitators validate perceptions, check accuracy, and clarify questions. Intentional engagement enhances ownership of both process and content, opening the door for enhanced commitment.

When transcribed into follow-up documentation, the group memory becomes a tool for accountability, moving commitments and agreements forward and outward into the organization. In this way, recording is a significant part of an information system that makes decisions and knowledge available throughout the organization.

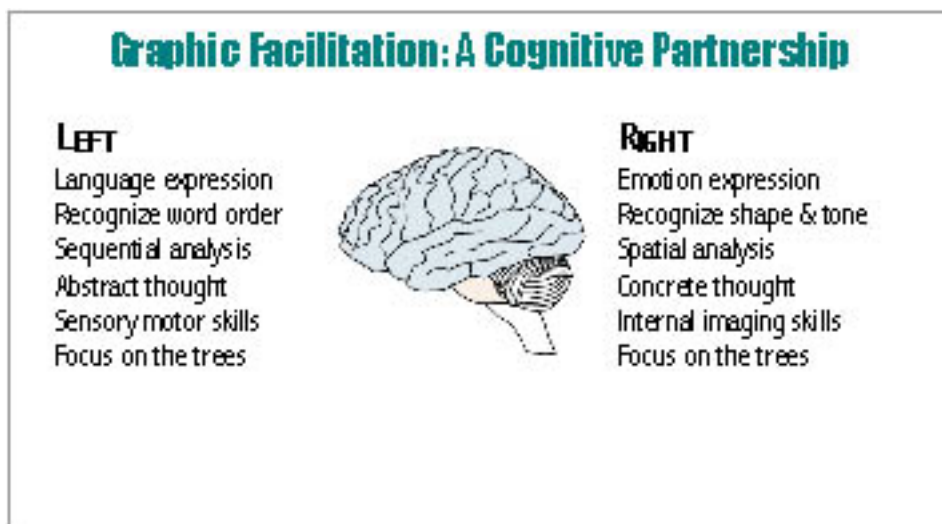
If visuals offer such value, why have so many felt constrained to use them in business or professional settings? Cultural forces over hundreds, even thousands of years have contributed to the belief that visual communication is childlike or inappropriate. Intellectual and expressive art is acceptable, but only for a talented elite at the fringe of society. Given this lack of credibility, it is no surprise that educational systems have reinforced verbal and written literacy over visual.⁴ However communications technology has sparked a revolution in the form of clip art, Power Point and web sites. Computers have put graphic expression at our nimble fingertips, tapping an



innate desire to integrate verbal and visual communication, and opening doors for an emerging field of visual practitioners.

At the heart of this new world of imagery is visual language. As Bob Horn defined in his most recent book⁵, visual language is the integration of words and pictures, rather than pictures substituting for words. Neither words nor shapes alone cannot offer the richness of meaning that the two combined provide.

It is commonly known that visuals increase retention in the learning process. The theory of “dual encoding” explains that we form two codes in our brains when viewing a picture: a visual image code and a phonetic code representing a picture.⁶ We simply have more logged into our memories when both images and words are used. Yet pictures alone generate too many associations in settings when exact recall or understanding is needed. In one visual literacy study, one test symbol generated over 20 meanings: unfortunately sometimes a picture is worth 1,000 words. Essentially we are hardwired for the integration of image and word. Only cultural standards have kept us from using what is already innate to our minds.



Contemporary theories regarding brain function and effective group behavior offer insight into the significance of visual strategies.⁷ Cognitive scientists agree that the two hemispheres of

the brain are specialized, yet inspite of popular sentiment, no individual is singularly right or left brained. Thought and learning are a continual flow, moving between the brain hemispheres and lobes. It is believed that we use a preferred sequence of sensory modes when thinking and communicating, in a symbolic language or software which the brain uses to process, metabolize, and recall information. Metaphor may not simply be the product of language and culture, but an elemental building block of thought and memory. While theorists offer different models, the message is the same: every healthy person utilizes all of his/her senses to think and interact with others. How we use them differs, though, resulting in multiple forms of “intelligence” and therefore, different working or learning styles.

This research and theory underscores the significance of visual processes in our everyday work in meeting and training rooms. Graphic facilitation offers a shared means for all styles of thinking. For those who need to “see what you mean” there is the visual and spatial dimension. The verbally-oriented can “tune into” the written and spoken word, and those who express their thoughts through action and feeling can “grasp and run with” the visual record. Verna Allee, author of *The Knowledge Evolution*, has observed that this multisensory approach naturally taps tacit knowledge and surfaces mental models.⁸ As ideas are clustered together on paper, individual contributions transform into shared knowledge. Consequently a group automatically works “smarter.” As collective action starts with shared understanding, recording significantly deepens group endeavors, ultimately enhancing the ability of a group to innovate and self-manage with its own knowledge.

Facilitating From the Mind’s Eye

Handling multiple pens, scale of the paper and cartoons are typically the first concern of the neophyte visual practitioner. Yet quickly sketched pictures are simpler to create than most imagine. Though visually satisfying, techniques such as perspective and shading are not critical



to basic recording: communication is the purpose, not art. The typical pictographs used while recording build from the basic geometric shapes, circle, square, triangle, spiral; they are often more reminiscent of childhood drawings than polished cartoons. These drawings form a quick, impressionistic visual language emerging from and known to the whole group.

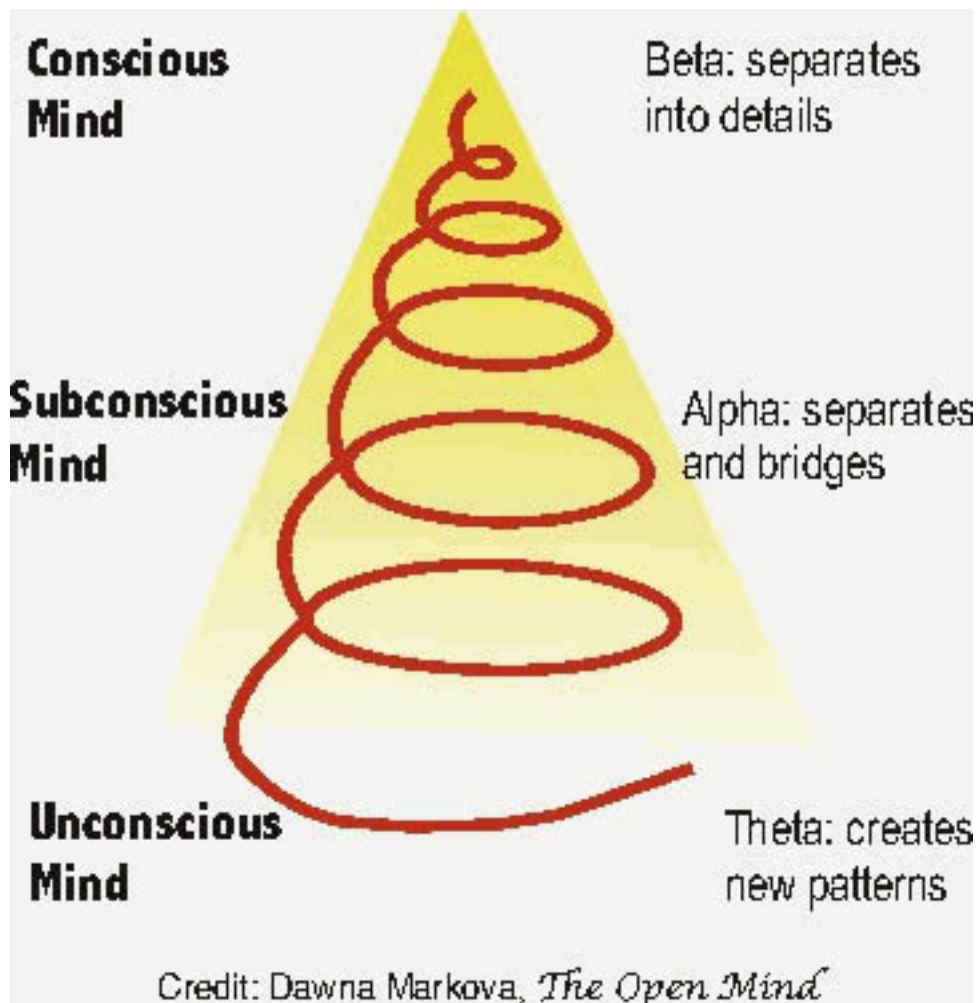
Facilitating visually may have more to do with understanding your own listening and thinking patterns than drawing. Each of us knows what to write when we take our own notes; but perceiving what is important to another person is not as straightforward. This challenge only magnifies when it must occur in synch with conversation and be organized and legible. The key is managing your personal cognitive style with the basic technical skills of recording and drawing.

Dawna Markova's *The Open Mind: Exploring the Six Patterns of Natural Intelligence*⁹ offers many insights into cognitive styles, particularly in regards to visual facilitation. Similar to Gardiner's *Multiple Intelligences*, Markova identifies distinct profiles based on the senses. For building visual facilitation skills, what is useful in this model is the link of the senses to states of consciousness. Markova proposes that we use one of three senses (visual, auditory, kinesthetic) to trigger one of three levels of consciousness – conscious (beta waves), subconscious (alpha waves), and unconscious (theta waves). Each person has a preferred sensory pattern that makes up his or her cognitive style. The order in which we use our senses is the significant difference. Our thoughts flow through this pattern, spiraling up and down the levels of consciousness, moving across both hemispheres. Consequently, everyone is a visual, right-brained thinker.

For example, consider the hypothetical profile of Rebecca, an accomplished meeting facilitator. With Auditory-Kinesthetic-Visual (AKV) as her pattern, Rebecca is a highly articulate facilitator, a sensitive coach, and a natural leader. Words come easily, enabling her to ask pointed questions and restate ideas quickly and accurately. Since it is a challenge for

Rebecca to listen without interrupting, she utilizes active listening techniques to pace herself as much as the group (Auditory, Conscious State).

For Rebecca, the auditory channel triggers the conscious state. This is the mode we use when we really give our attention to someone, or are the least able to be distracted. The conscious state of mind is most associated with learning and “being smart.” Ironically, it is actually the state when we are least receptive. Markova even calls it the “one way mind” as this is the state when we know the answer, the truth, or a decision.



Rebecca’s subconscious state is triggered by the kinesthetic As she works with a group, she has lots of energy and feelings just below the surface, even when relaxed and confident.



What is Your Pattern?

Conscious: Alert to the Details; In Control

Take a moment to notice what you do to concentrate or really give something your fullest attention. Do you sit up straighter or settle into the chair? Do you look people in the eye or really focus on an object? Are you attentive to the words and sounds in the room?

Subconscious: Separates and Bridges

Now consider a time when your attention is split, such as when facilitating a meeting. You may notice that to shift from alert awareness to this subconscious state, you need to let your thinking be "iffy" or fuzzy.

Unconscious: Creates New Patterns

Spiraling down to the unconscious, let yourself recall those moments when you "space out" or let your mind go wide or deep. What is it you do to let go and be completely at ease, with no need to know or control?

CREDIT: Dawna Markova, *The Open Mind*

Typically as she listens and sorts out her thoughts, she gestures with her hands and moves around the room. She lets the group know what she is going to do just before she takes action, such as "Here, let me write that down". She feels the pain of others, and is known to reach out gently to reassure them.

What Rebecca is doing is equally thinking; it is just another form. Because this state is the link between the conscious and the unconscious, it is critical for developing useful ideas or making a thoughtful decision. Most of us are uneasy in this state as culturally it has been deemed "confused," or "indecisive."

Making eye contact with people is usually fleeting for Rebecca. Yet as a trained professional, she has learned to hold other's eyes as they speak. Most of the time she is not really seeing the

speaker, though. At the unconscious level Rebecca is envisioning how the group's ideas fit

together into a whole picture. When lost in thought, visual details often overwhelm Rebecca. Combined with her messy handwriting, this has made Rebecca not consider herself a visual thinker. Yet she is a visionary and a systems thinker, something that pairs well with her natural leadership.

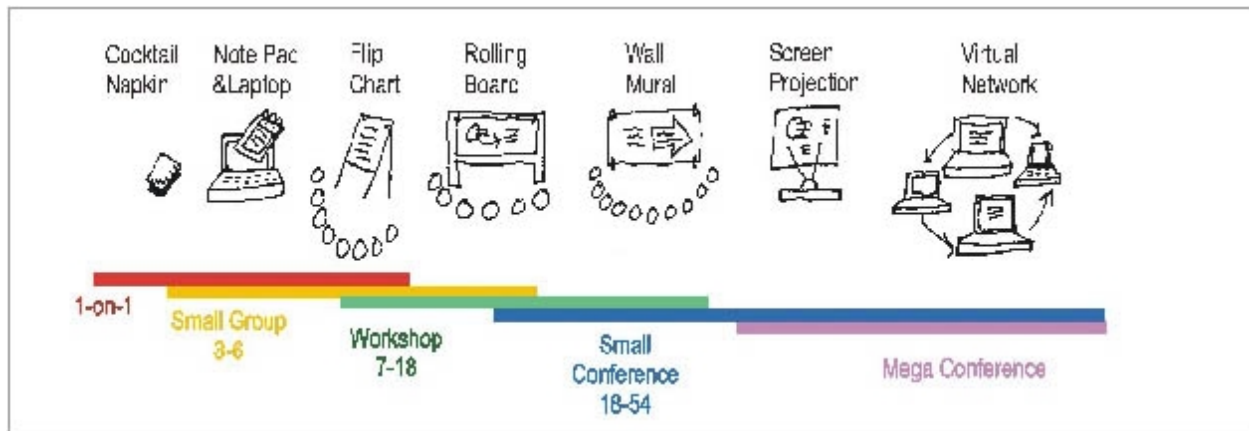
In the unconscious state, Rebecca is accessing her deepest memories and most creative thinking. Without it there is no innovation or new solutions to bring to decision making. To tap this realm, some people find they need to close their eyes, to access inner imagery or block what is visually distracting. Others move gently, swaying or rocking or simply listen to the silence.

If you follow the reflective questions in the sidebar, your preferred pattern (i.e. vak, kva, etc.) may seem obvious. If not, simply follow your intuition about what you need to access each state of thinking. This quick review of Markova's model does not begin to do justice to the ideas and practice activities outlined in *The Open Mind*. Following your own intuition about how you use your senses can give help you develop capabilities as a visual practitioner. Graphic recording demands multisensory processing: listen, write, draw, move, think spatially, synthesize, and speak (to name a few skill areas). It is a dance, as practitioner David Sibbet succinctly states, between awareness, relationships, information and motor skills. Through our senses comes the input of spoken ideas, and then through our senses again, the output of visual language.

Let's look again at Rebecca, and how she applied her insights to developing her visual process skills. With her talent for words, Rebecca is good at mentally capturing the detail in a conversation. The key was to learn how to channel this information to a visual format from which she could then offer feedback and ask questions. One approach she uses is Post It Notes, with the group recording their own thoughts as they dialogue with Rebecca. Channeling her desire for action, Rebecca shuttles Post Its up to the large group memory— a simple graphic



metaphor which she prepared earlier in the day. For her systems oriented mind, the visual metaphors are easy as long as she sticks to simple pictographs. Because she spaces out with lots



of visual detail, sometimes Rebecca asks participants to place and sort the Post Its. As the information falls into place, Rebecca adds a few labels with a bright felt pen, and then verbally synthesizes “the big picture” for the group. In this way, she has paid attention to her own cognitive preferences, and yet honors the thinking styles of others.

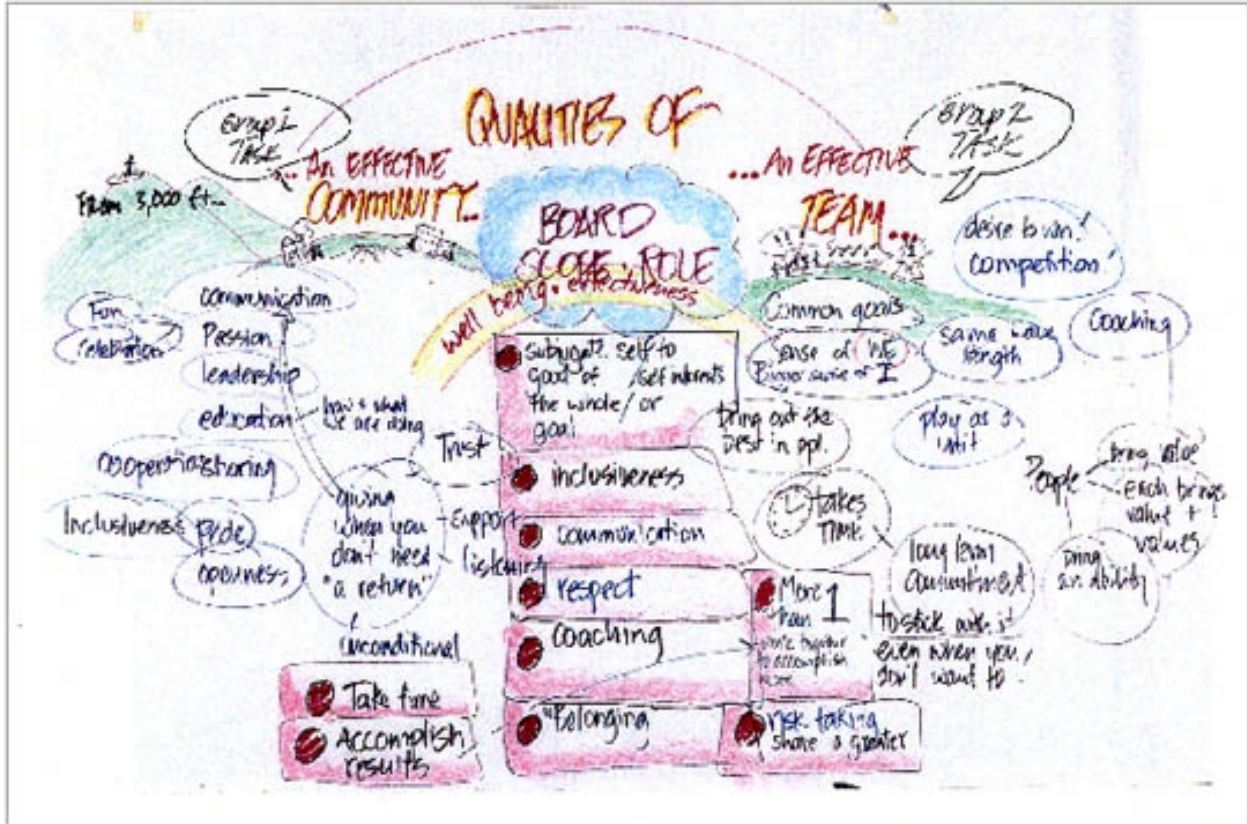
No model ever truly can reflect the wonderful complexities of the human mind or experience. As you explore these ideas, remember the difference between a habit and a preference, a learned behavior and something that feels naturally “just right.” These patterns address how thoughts flow through the mind, not personality. Most of all trust that at some level, thinking visually is a part of your natural cognitive style.

Visual Space, Interactive Place

As facilitators we guide thinking and conversation, connecting people to people and people to ideas. These interactions occur within physical and social environments, as well as, with increasing frequency, virtual settings like the Worldwide Web. Attention to environment is as much a part of working visually as writing and drawing. This is true both for the physical environment, as well as the social.

For the visual practitioner, the physical room greatly shapes how well the recording and visual strategies can be used by the group. Spacious well-lit rooms are critical. Where possible, meeting rooms need to be set up to face the wall on which large paper templates have been hung, rather than forming circles or using rows of chairs. When very large groups meet (30 to 200+ people), tables rounds create small conversation groups of 6-8 people, each with its own wall template or “tablecloth paper” for recording.¹⁰ Increasingly video technology is being used in large group settings by projecting close ups of the recording on large overhead screens so that people can truly read and interact with the information. Overhead projectors work to some degree, but unfortunately they do not create one large working record. Electronic meeting support (EMS) — networked computers used in the meeting room with some form of groupware — also provide many of the benefits of graphic facilitation. For brainstorming, detailed capture of ideas, and anonymity EMS is an ideal tool. Since it does not produce a synthesized “big picture,” though, pairing EMS with graphic facilitation is a powerful and flexible approach.

Electronic meetings and virtual communities are bringing new attention to the social aspect of meetings and work environments. Information is shared, new ideas generated and daily work accomplished through conversations and networks of relationships. These connections begin and are reaffirmed in meeting rooms. Increasingly these connections are sustained online.



The degree of socializing varies from one work culture to another; but the primacy of social interaction may even only be increasing given the preponderance of communication devices. Social interaction is so fundamental that it is nearly invisible, yet it is considered by contemporary sociologists as the core process in human life and communication. Gesture and metaphor are key mechanics in our communication; place provides the context. In the meeting room, these variables weave together as group dynamics. Just as visual processes resonate with the imagery in individual thought, they also reflect and shape a group.



Every experienced facilitator knows that agenda design is not simply about topics and timeframes. Attention to the contextual environment is as important as the outcomes, topics, and roles of the participants. When an agenda is designed to explicitly use visual strategies, a facilitator has a significant tool for pacing a group, fostering inclusion, and timing divergent and convergent thinking. What favorite processes might be creatively augmented with interactive visual formats?. For example, Future Search and Open Space Technology inherently use imagery and graphics, even though they are not labeled “visual strategies.”

A technique that benefits all practitioners regardless of experience or sensory preference is the use of visual organizers such as diagrams and metaphors. Wall-sized templates such as large blank diagrams and pictorial metaphor maps¹¹ provide a framework for recording which is not only easier on the recorder but encourages participant self-management and teamwork as well. As such, any visual organizer is an interactive environment. They can be created on the spot or prior to facilitation.



Metaphor maps are simply the use of a familiar metaphor, drawn on a very large scale which is then filled in with text or post it notes. A more polished tool is the set of Graphic Guides© produced by Grove Consultants International. Be it a tree to represent the organization or a road to share an organizational history, metaphors lead to rich associative thinking.

A number of visual techniques can be used to gain greater value from the group’s experience and ideas. One popular technique is to intentionally pull agreements and key questions “off of the wall” where the recording is unfolding, focusing and reinforcing group direction and cohesiveness. Build into the process plan a “gallery walk” for participants to really reread and reflect on what they have said, stopping to really notice the group’s wisdom is embedded in the recording. Another familiar idea is the “parking lot,” a flip chart or section of wall devoted to tangential ideas. Work with large paper to explore and expand ideas, circling and connecting ideas. Then use a flip chart to pull out a clean list of agreements or key questions which have emerged. The more the information on the wall is directly read, touched, and considered, the greater value it will be.

Meeting outcomes are the best tools to determine what kinds of visuals are needed. If information sharing and mutual understanding, but not decisions or agreements, are the objective, then visual metaphors are a promising choice. Clustering similar ideas is useful when you are seeking areas of agreement. This works well with both an open-ended dialogue and structured processes such as affinity diagramming. Lists are always dependable for the unexpected; they are also a great way to broaden visual skills by keeping to a known format, but adding visual elements such as interesting bullets, pictographs or colored–chalk highlights.

In the next decade, the most important new sense-making tools will be those that help people visualize and simulate. Visualization techniques reduce vast and obscure pools of data into easily comprehended images.
Paul Saffo, Institute for the Future
Harvard Business Review, 1998

Technology has returned us full circle to imagery as a universal mode of communication. Knowledge was once transmitted in a largely oral and imagery-based tradition. In Medieval Europe altar paintings and stained glass instructed the masses. With the advent of literacy, communication and learning was channeled through first calligraphy and then the printing press, to the demise of oratory and imagery. Today, though, we have collectively re-embraced imagery. “Icon” has taken on a whole new meaning as people point and click their way along the information highway. Clip art has put visual language at people’s finger tips and on their web sites. Visuals have been rediscovered as a critical part of thinking and communicating. As a low tech/high touch technology, graphic recording captures both the message and energy of the group. Together with strategic conversation, and supported by communications technology,



interactive visual approaches offer a creative, engaging process which leverages how we naturally think and learn.¹²

Speaker Bio

Jennifer Landau is an early explorer of interactive visuals and graphic recording, first joining Sibbet & Associates in 1981 and then establishing her own practice in 1984. As senior partner in Hammond & Landau, Jennifer provides visual process consulting to long-term change teams. She specializes in large visual metaphors that foster teamwork and community, and coaches colleagues in visual strategies. In addition to organizational work, Jennifer is involved in R & D in two areas: with a major software firm, interactive online environments; and as an ongoing passion, the relationship between cognitive process and multi-sensory facilitation techniques. Her academic background is in community and organization development. Conference presentations include OD Network, ASTD, American Productivity & Quality Center, and IAF. With Jean Westcott, Jennifer co-authored *A Picture's Worth 1,000 Words* (Jossey Bass/Pfeiffer) and *Field Guide to Flip Charts*. She lives in San Francisco, but plays in the mountains with her husband, children, and Girl Scout troop as often as possible.

Notes

¹ Joe Brunon may be the first documented visual practitioner. While many others have also “discovered” graphic facilitation on their own, Geoff Ball, David Sibbet, and Sandra Florstedt were true path breakers, offering the first public Group Graphics workshop in 1980, David Sibbet in particular has shaped my thinking and practice with his mentoring and articulation of the Group Graphic process theory. This article builds on all of these pioneers’ work, including substantial contributions from over 20 years of conversation with Suzanne Bailey, Adrienne Burke, Susan Kelly, Lynn Kearny, and Jean Westcott.

² I am indebted to Sherrin Bennett, Juanita Brown, and David Isaacs for their work articulating the essential role of conversation in organizations, and their collaboration in exploring the interrelationship of conversation and visual thinking. See Brown and Isaacs

“Conversation as a Core Process” in *The Strategic Thinker*, vol. 7, no. 10, 1996-97; and Bennett and Brown “Mindshift: Strategic Dialogue for Breakthrough Thinking” in *Learning Organizations*, edited by Chawla and Renesch, Productivity Press, 1995.

³ From *The Natures of Recording*, self-published by Susan Kelly. Call 415-550-8781 for information.

⁴ For a provocative logic regarding literacy and imagery see Leonard Shlain., *The Alphabet Versus the Goddess*, Viking, 1998.

⁵ Robert E. Horn, *Visual Language*, MacroVu Press, 1998 provides an outstanding synopsis of the development of visual language, and the definition of visual syntax. See www.macrovu.com for additional information on Bob’s research and Mapping Great Debates series.

⁶ See Ruth Clark, *Building Expertise*, ISPI, 1998.

⁷ See Howard Gardner, *Frames of Mind*, Basic Books, 1983; George Lakoff and Mark Johnson, *Philosophy of the Flesh*, Basic Books, 1999;; as well as the web site of cognitive scientist Pierro Scaruffi www.thymos.com/

⁸ From a personal conversation with Verna Allee. See *The Knowledge Evolution*, Butterworth-Heinemann, 1997, for Verna’s assessment of the value of recording and graphic facilitation in expanding organizational intelligence.

⁹ The examples and descriptions in this paper are a adaptation and synopsis of the model as defined in *The Open Mind* by Dawna Markova, , Conari Press, 1996. Dawna’s work has inspired many new ideas about what “working visually” means. See www.ptpinc.org/ regarding publications and The Institute for Multidimensional Learning.

¹⁰ See www.theworldcafe.com for further details on this process as articulated by Juanita Brown and David Isaacs.

¹¹ Synergraphic metaphor maps is the name I coined in 1996 for large pictorial metaphor charts used as frameworks or templates for graphic facilitation. The Grove Consultants International produces a specific set of templates called Graphic Guides. See www.grove.com for further information.

¹² See www.HnL-Consulting.com for more information regarding Jennifer Landau, working as a visual practitioner, and the International Forum of Visual Practitioners.