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Visual Tools and Stories from 50 Experts Worldwide

THE WORLD OF VISUAL FACILITATION

unlock YOUR POWER to connect PEOPLE & IDEAS

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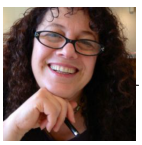

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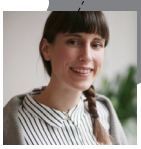

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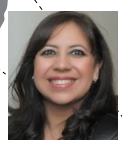

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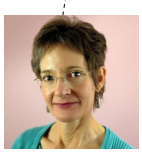

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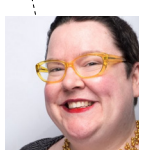

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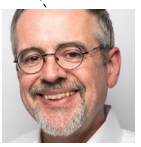

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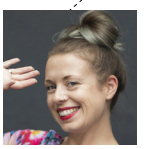

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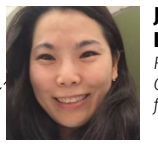

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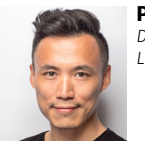

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Brandy Agerbeck

THE VALUE OF VISUAL ORGANIZATION

Along a proven path, seven structures lead you toward visual agility, richer collaboration, and flawless service to your participants.

Visual Listening

THE VALUE OF VISUAL ORGANIZATION

Every time we grab an ephemeral conversation or a spoken idea and capture it on paper, it becomes more powerful. Transforming the spoken word into something concrete and physical shifts the energy and quality of conversation in the room. Individuals feel heard when they see their contributions made tangible. Once listened to, a participant is more open and focused on others.

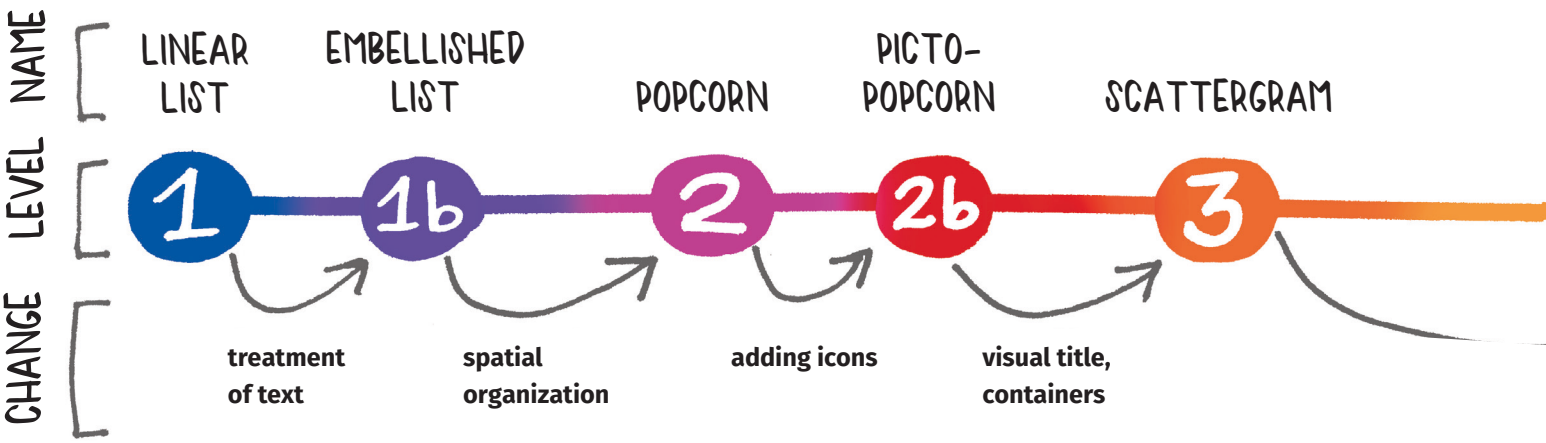
Groups feel more productive and engaged when they can see and touch their work, especially when they see that work accumulating and surrounding them in their workspace.

Conflict dissipates when individuals can point to a drawing to make their argument, rather than arguing with each other.

All sorts of visual facilitation techniques help groups navigate complexity together. Within these groups, individuals see their contributions and make new meaning for themselves. Each one of us can use these same techniques in our own personal work. **A desire to harness these powers led you to this book**.

There is value to making our work visual, spatial, and physical. There is even more value when our work transcends capturing **WHAT** is happening in the room, to making meaning of **HOW** it is happening, and the deeper **WHYs**.

THE VISUAL ORGANIZATION SCALE



This chapter shares a model of meaning-making that illustrates the choices and nuances of how we capture, organize, and synthesize our own work and the work of groups we support.

Shortly after I fell into the field of graphic facilitation in 1996, I was asked to teach—specifically, to teach my strength for synthesizing information. With strong skills but little language around the work, I could eke out two suggestions: "Create more flow," and "Use more white space."

Twenty years later, people join me for a three-day immersion I lead, called *The Lab*.[1] Among the top goals that bring them through my door is wanting to strengthen their listening, organizing, and synthesizing skills. My 'lab partners,' from all sorts of professional roles, see the value of these skills.

To support this teaching and learning, I've created a model called The Visual Organization Scale (VOS). This model provides an index and vocabulary around the levels of capturing and organizing we do (see Figure 1). (The original iteration, The Synthesis Spectrum, can be found in my first book, *The Graphic Facilitator's Guide*.[2])

While I unabashedly praise (and absolutely thrive in) the right half of the model, not all of my work fits there. Circumstances call for movement across the scale. A quick icebreaker activity at the start of a meeting may be sketched in quick Popcorn (Level 2), grouping similar answers together. Later, a report out is drawn in Structured Clusters (Level 4). A complex, open discussion invites us to enter my happy place, levels five through seven.

The goal of this model is to help practitioners recognize at which levels they are currently working, identify which levels best match their client's needs, and strengthen their own skills in meeting those needs. Also, I offer this as a conversation tool between practitioners, facilitation partners, and clients, to have richer conversations around visual tools and meaning-making.

Now I'll walk you along the scale. Each level contains a description, a visual example, and a short list of pros (✔), cons (✘), and tips (★). I end the chapter with guiding principles and closing thoughts.

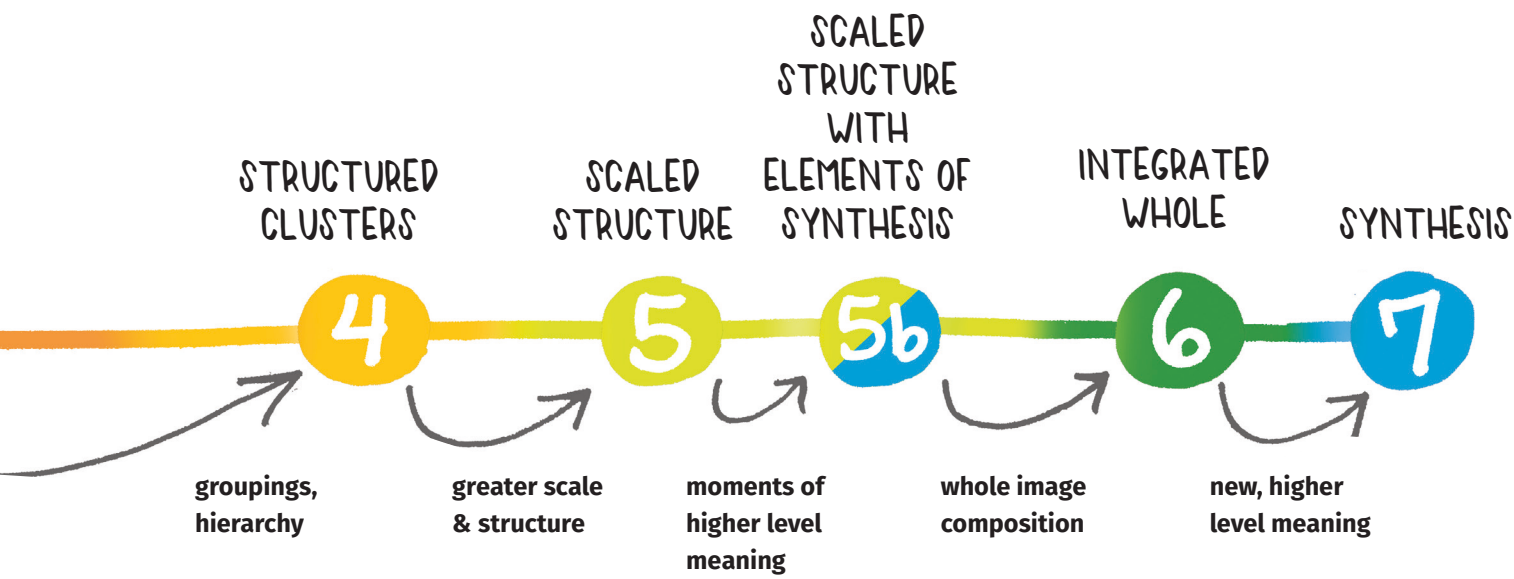


Figure 1: The Visual Organizational Scale (VOS)[3]

1 For more information, see: www.loosetooth.com/lab.
2 Agerbeck, *The Graphic Facilitator's Guide*, pp. 260-261.
3 All drawings in this chapter created by Brandy Agerbeck. All rights reserved.

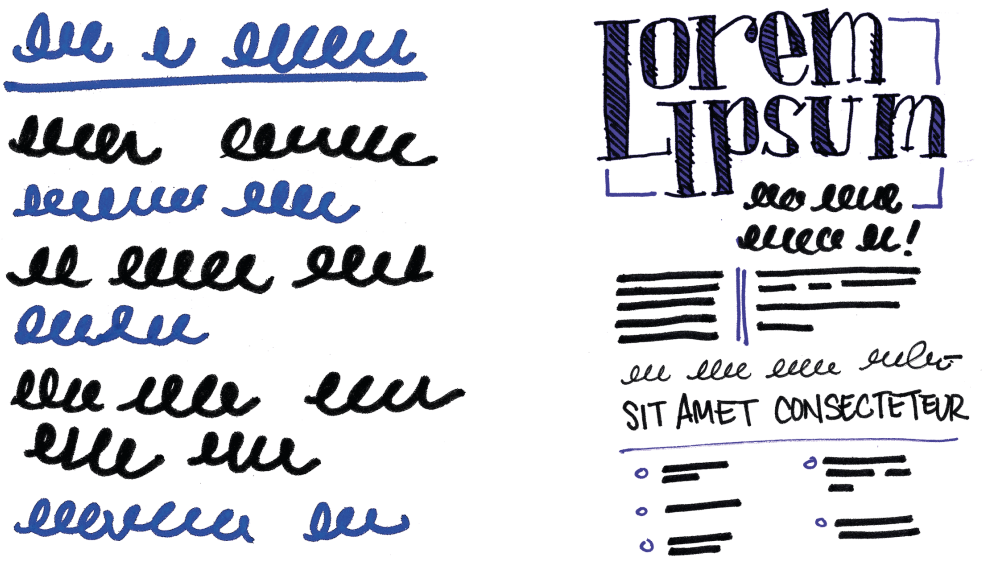


Figure 2: The Standard Linear and Embellished Linear Lists

LEVEL 1: LINEAR LIST AND LEVEL 1B: EMBELLISHED LIST

The tried-and-true lists that have filled countless flip charts are illustrated in Figure 2. Aside from one's anxiety about penmanship, lists are a very comfortable format.

Unless your task involves working out a sequence or generating a list with no desire for groupings, the Level 1 Linear List is not the best choice. It does not allow for any spatial organization. If the sixth item down relates to the third item, there's no room to connect the two. It simply goes below item five.

Mike Rohde's original style of sketchnotes[4] is the exemplar of Level 1b, the Embellished List.[5] Vertical sketchbook pages are filled with text from top to bottom. Again, we lack spatial organization, but we add varied scales and treatments of text, creating differentiation and emphasis. Generally, sketchnoting is an individual activity, and the act of live capture strengthens one's memory of the content. Design choices in the drawings make it easy to flip back and connect to the content again.

- ✔ Fast
- ✔ Good for sequences
- ✔ Works for divergent, generative processes
- ✔ Creates emphasis and meaning with different lettering choices (1b)
- ✔/✘ Familiar format
- ✘ Keeps us in linear, text-based habits
- ✘ Hard to connect non-adjacent items
- ★ Alternate two colors to differentiate separate ideas more quickly

4 See examples of Mike Rohde's sketchnotes and learn more about the technique in his chapter entitled *Sketchnoting: Your First Step into Visual Thinking.*

5 Rhode, *The Sketchnote Handbook.*

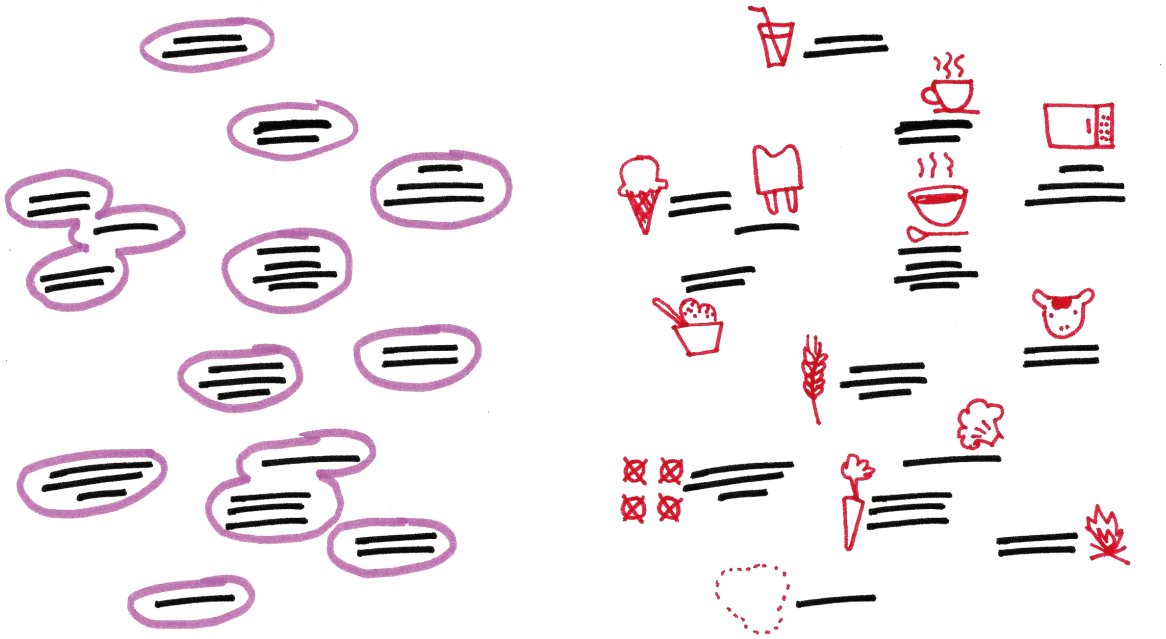


Figure 3: Capturing with the Popcorn and Picto-Popcorn Methods

LEVEL 2: POPCORN AND LEVEL 2B: PICTO-POPCORN

Moving into the second level, we break the linear format. If Level 1 represents the tidy roll of movie credits, Level 2 is the popcorn scattered across the cinema floor (see Figure 3, above left).

Each point is discrete on the page; written as its own 'chunk,' no longer lined up. Even if placement is completely random, this method of capturing disrupts our ingrained list-making habits.

Ideally, placement *isn't* random. Instead, we make visual decisions of proximity. We decide where each new chunk belongs on the page in relation to what is already there. Similar ideas huddle near each other. Larger distances connote contrast or differences. Clusters and patterns emerge.

With Picto-Popcorn, (Figure 3, above right), you add an icon to each kernel. Imagery aids memory and boosts retention. It can also trap the practitioner into binary thinking, tying up one's listening focus and mental energy as they attempt to translate every statement into a corresponding icon. When faced with a more abstract concept, capture can stall out. In the example above, the dotted shape represents the lack of an icon for the word *nutrition*.

At its worst, I call this 'iconitis.' Don't sacrifice the opportunity to create meaning through placement and proximity because you were mentally searching for a pictogram. Imagery can always be added after the content is captured.

- ✔ Breaks linear mode, open to spatial organization
- ✔ Friendly to clustering
- ✘ Beware of iconitis getting in the way of useful organizing
- ★ Focus on content capture first; add images later

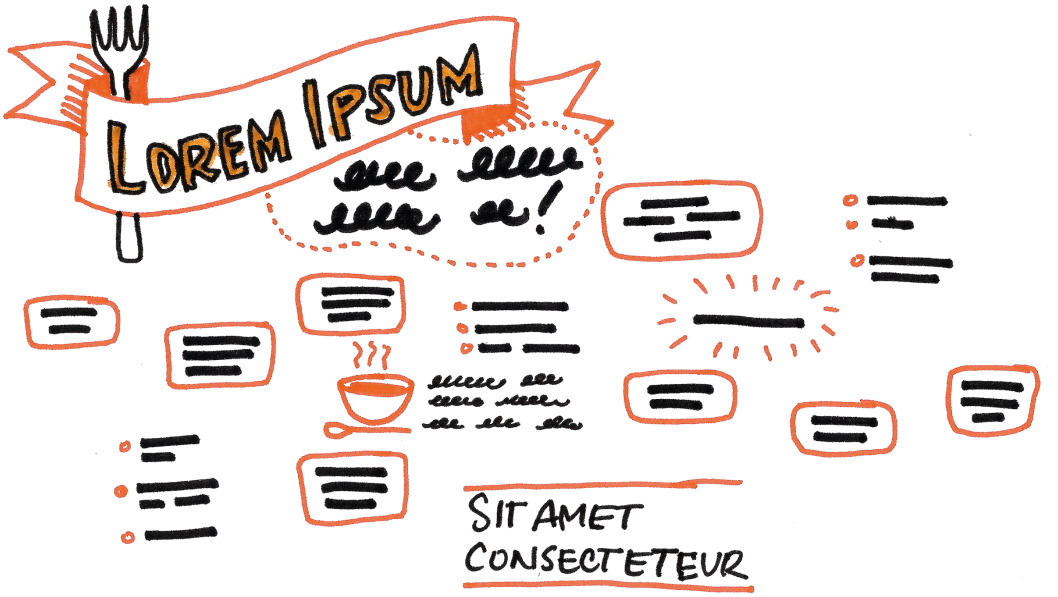


Figure 4: The Scattergram

LEVEL 3: SCATTERGRAM

In "Stories and Storytelling,[6]" Anthony Weeks coined the term *scattergrams*. These live, large-scale drawings may be "rich in content" and "faithful to what was said," but lack "flow, connective tissue, directionality, and sequence" (92).

Aside from a large, decorative title (usually in the upper left corner), this third level lacks scale and hierarchy. In the vernacular of my second book, *The Idea Shapers*,[7] these drawings are "giant posters filled with postage stamps" (285).

At their best, Level 3 drawings should be chock-full of the group's well-distilled content. As stated at the top of the chapter, this helps individuals feel heard, creates a shared understanding, and helps the group see and touch their work.

Two key visual thinking aspects are missing at this level. First, there's no sense of navigation or direction, either while watching the drawing take shape or viewing the finished artifact later. Visually, these drawings are hard to read. Second, without organization created through hierarchy, scale, and flow, every 'postage stamp' appears to have the same weight or importance. No discernment or meaning is made by showing connections, conflicts, interdependencies, themes, or patterns.

- ✓ Fidelity to what was said
- ✗ Hard to read, difficult to navigate
- ✗ Every point feels equal to every other point
- ✗ No relationship between individual chunks

6 Weeks, "Stories and Storytelling," from the anthology *Drawn Together Through Visual Practice*.
7 Agerbeck, *The Idea Shapers*.

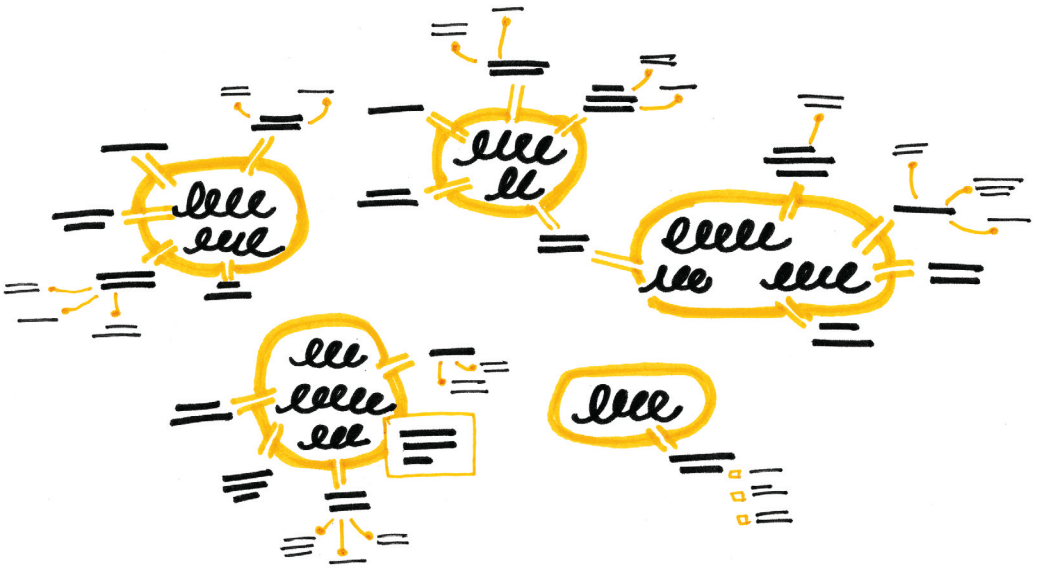


Figure 5: Structured Clusters

LEVEL 4: STRUCTURED CLUSTERS

This level creates a clear distinction between main topics, and shows a hierarchy of information within each topic.

Structurally similar to Tony Buzan's hub-and-spoke-shaped mind mapping technique,[8] this approach connects supporting details that sprout from a central idea. These clusters create clear centers of gravity on the page.

Consistent use of visual choices—for example, all uppercase writing for the main topics, or using the same weight and color of connector lines throughout—creates patterns that make the drawings easy to navigate. At a glance, you can instantly see (Figure 5) that there are five main ideas and that each grouping has three levels of information: main topic, details, and further supporting details. Repetition of pattern makes it easy to compare information across clusters. If you were gauging viability of the five ideas above, the lack of details hanging from the lower right topic may signal less interest, whereas other topics sparked more detail.

A post-breakout session report out may be well served by this level, but plenty of events would not fit into these tidy groups. Still, listening for levels of information within a conversation and mapping them through Structured Clusters creates orderly meaning for the group.

- ✔ Easy to visually navigate
- ✔ Represents main ideas and supporting detail
- ✘ Not all content falls into clustering
- ★ Use a lighter color for the 'connective tissue' forming the border around main ideas, and for the connecting lines between ideas (a lower-contrast color recedes into the page, creating less visual competition with content)

8 For more, visit: www.tonybuzan.com.

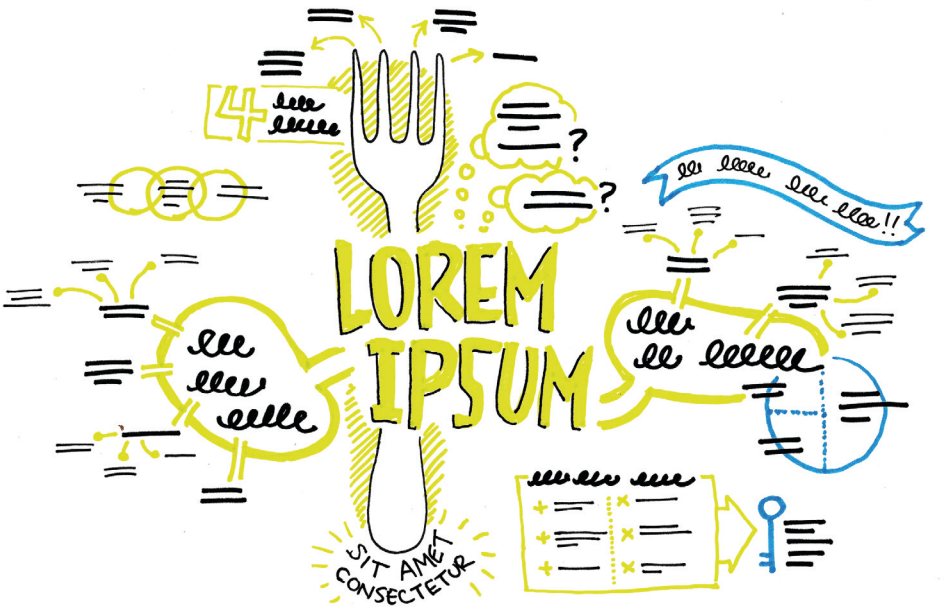


Figure 6: Scaled Structure with Elements of Synthesis

LEVEL 5: SCALED STRUCTURE AND LEVEL 5B: SCALED STRUCTURE WITH ELEMENTS OF SYNTHESIS

Next, we expand scale further to let the content take whatever shape it needs to. Scaled Structure captures the content in myriad ways. Figure 6 illustrates two Structured Clusters alongside a Linear List (in the box toward the bottom right of the chart).

Building on the last level, Scaled Structure makes powerful use of sizing to clearly delineate the major ideas (large, written in all capitalization) from the details (smaller, lowercase letters). 'Connective tissue' of connecting lines and containing shapes, along with ample white space, creates an easy-to-navigate drawing.

In the sample above, the yellow-green areas represent the capture of what's been said in the room.

The elements of blue on the right connote the Level 7 Synthesis that the visual practitioner has added. For instance, the ribbon banner in the upper right could contain the overarching theme of the Structured Cluster below it. While these words might not have been explicitly stated by the participants, the visual practitioner adds value by sussing out connections and themes in the conversation.

- ✔ A flexible format that allows for different kinds of information
- ✘ Additional structure and organization demands more focus and mental processing in real time
- ★ Make visual choices at the start of the session to open up your mental focus for listening and organizing

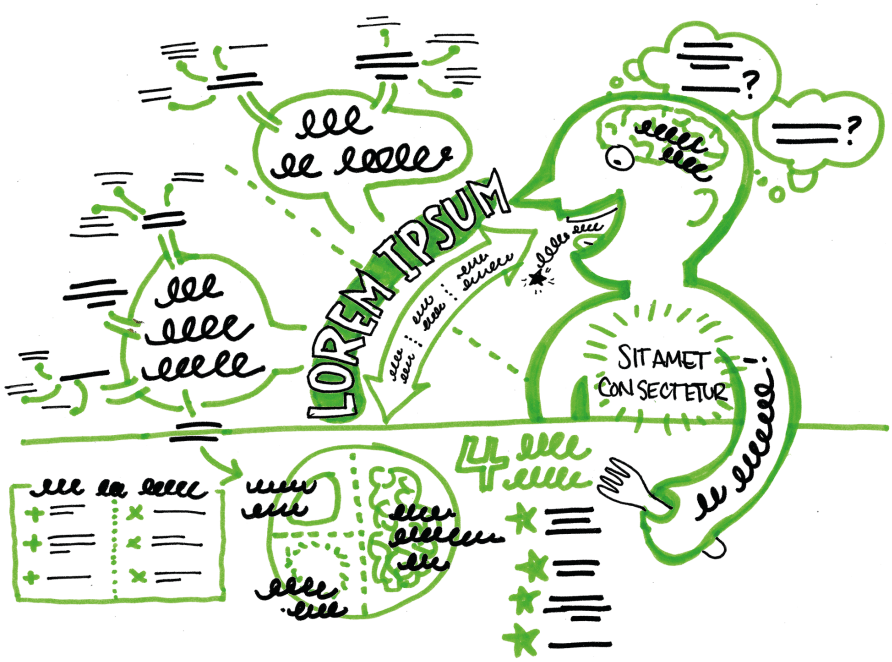


Figure 7: The Integrated Whole

LEVEL 6: INTEGRATED WHOLE

While Level 5 lets the shape of the drawing emerge organically, Level 6 begins with an initial overall shape. Approach the canvas as a whole composition—be it a flip chart, whiteboard, or mural-sized piece of paper, using the areas within the working surface to create meaning.

For example, create a sense of time progression by placing past events on the left side of your page, and future events on the right. Or populate the top of the page with 'ten thousand foot high' strategic views and the bottom of the page with 'on-the-ground' tactical ideas.

In Figure 7, everything above the edge of the implied table could be about the dining experience from the figure's point of view; everything below could be about the food itself.

At this level, you give yourself 'scaffolding' on which to build the contents of the conversation. Very often in my work, I'll build off of my giant, central everyman in the people-centric conversations I support. I don't know exactly where the conversation will go, but I know how each area of the chart will function. I give myself spaces to work with within the drawing.

- ✔ Sense of order and meaning when well-integrated
- ✔ Works well with open-ended conversations
- ✘ Does not lend itself to narrowly designed processes, like brainstorming around a specific prompt
- ✘ Capturing rich content while composing the image takes lots of focus and practice

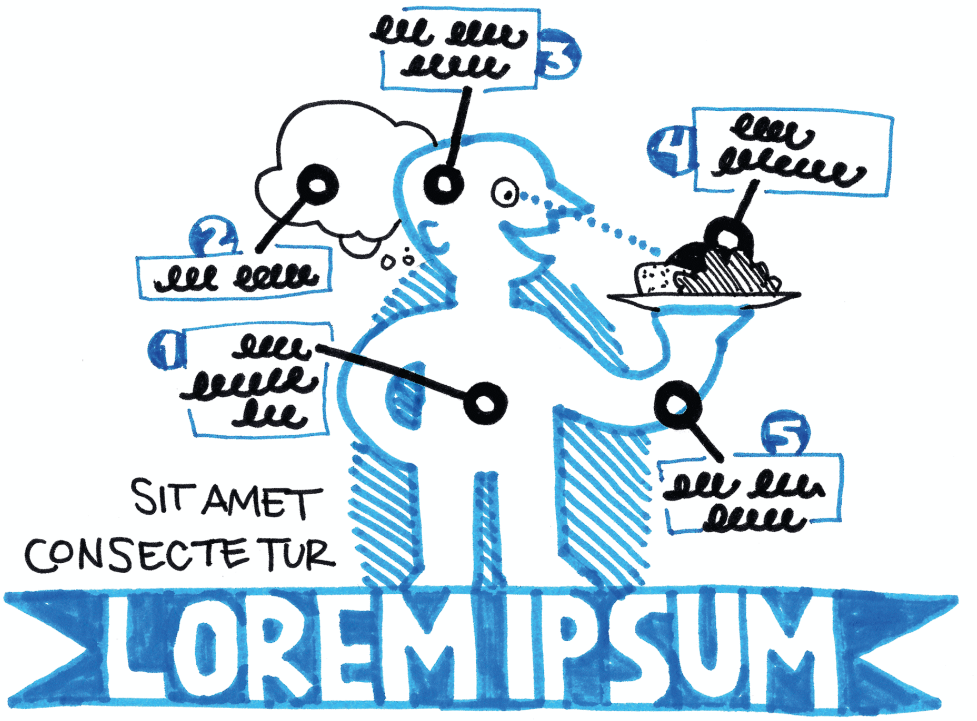


Figure 8: Synthesis of Key Takeaways

LEVEL 7: SYNTHESIS

Synthesis involves creating something new from your sources. It is that elusive aha moment where the mental puzzle pieces click into place, and a higher level understanding is revealed.

This highest level of visual organization is also the hardest to accomplish in real time. When working in the role of graphic recorder or graphic facilitator, leaping to Level 7 may not serve your group.

In both *The Graphic Facilitator's Guide* and *The Idea Shapers*, I used Aesop's fables to demonstrate synthesis. This is because each fable contains the story itself and the moral of the story.

Synthesis is the moral of the story, the key insight you take away from the fable. For most live visual support, not reflecting the group's story is a disservice. For instance, if you stood in front of a group for an hour-long session and drew the equivalent of the drawing featured in Figure 8, you'd be missing the meat of their experience. Your participants would not feel heard. By contrast, the same drawing could be a great, post-event communication tool to those who weren't in the room, or to the executive asking for the key takeaways.

- ✓ Works well as a high-level communication tool
- ✗ Does not capture the rich content of group's conversation and process
- ✗ Extensive mental processing takes time and focus—very difficult to achieve in real time
- ★ Depending on the project, be mindful of the right balance of the participants' story details and the summarizing "moral."

SUMMARY AND GUIDING PRINCIPLES

As a visual practitioner, I hope you were able to follow along on the scale, perhaps recognizing where your strengths and comfort zones lie, and considering where you may want to stretch and build your skills. You likely recalled different work scenarios where you chose one level over another. Or maybe you felt a lack of choice, because you don't feel capable at all levels.

As a facilitation partner or client, you may have recognized the work of your visual partners. Perhaps you recognized the levels that resonate most with you, and now have a language to describe what you are seeking.

You may have placed yourself in the seat of the participant, on the viewing side of these seven levels—recognizing when an approach missed the mark or felt confusing. Hopefully, more often than not, visuals added enormous value to your process, and helped you do work you didn't know was possible.

Again, the Visual Organization Scale is shared as a way to make stronger choices in our work, understand the nuance of visual facilitation, and have richer conversations about how to partner together.

To these ends, I offer a few guiding principles:

To the left of the scale lies speed; to the right, depth.

Lists can be lightning fast because so few visual decisions are required. One item follows the next. As you move up in levels, the mental processing becomes heavier, which takes a lot of time and focus. Much like simultaneously running multiple programs slows your computer, listening, thinking about placement, choosing colors, distilling text, looking for patterns, making connections, culling themes, creating iconography, deciding scale, thinking of structure, and actually writing and drawing on the paper *is taxing*. This chapter might make this work look simple, but it is not easy.

To stay present and listen well, make visual decisions at the start. This will ease your cognitive load.

For example, choose a color scheme before you begin and know how each color will function in the drawing. The vast majority of my live professional work uses a three-color palette. Not only am I not fumbling with markers, I have mental bandwidth open for higher-level thinking.

Consistency is critical.

As the visual practitioner, prolonged practice creates muscle memory. Relying on your visual vocabulary gives you agility in the moment. As the viewer, we seek patterns to make meaning. Patterns should only be broken for good reason. Break a pattern when you want to draw attention to an idea or create contrast.

Give yourself time and space for visual organization.

Most people need time to thoroughly process varied content, to see the patterns and make connections.