JEROEN **BLIJSIE,** TIM **HAMONS,** and RACHEL S. **SMITH**

Visual Tools and Stories from 50 Experts Worldwide

THE WORLD OF VISUAL FACILITATION

unlock
YOUR POWER
to connect
PEOPLE
& IDEAS

FOREWORD BY **DAVID SIBBET** DESIGN BY **VISUALITY**

Including ONLINE BONUS MATERIAL

CONTENTS

Meet the Authors VI
Online Bonus Material XII
From the Editors XIII
Foreword XVII
Acknowledgements XXI
The Book Behind the Scenes XXIII

Getting Started

VISUAL LANGUAGE AND DRAWING

Holger Nils Pohl
My Journey as a Visual Facilitator 3

Malgosia Kostecka
The FUNdamentals of Visual Language 9

Kelvy Bird and Holger Nils Pohl
Using Color 19

Heather Leavitt Martinez
Lettering for Legibility, Hierarchy, and Speed 27

Tomoko Tamaari
Visualization of Human Emotion 37

Tim Hamons and Jerre Lubberts
Graphic Formats: Start with the Right Structure 45

Jim Nuttle
Polish Your Charts for Clarity and Impact 59

THE BASICS

Mara Callaert
How to Set Up a Room for Visual Facilitation 73

Renatta Algalarrondo
The Right Tool for the Job 79

Mike Rohde
Sketchnoting: Your First Step Into Visual Thinking 99

Jessamy Gee
Visual Note Taking: Elements & Principles 113

Martine Vanremoortele
Graphic Recording: An Improvisational Dance with the Facilitator 125

Dana Wright Wasson
Using Stickies To Create Exciting Ideas and Engaged Participants 133

Holger Nils Pohl
Designing Meetings with the Clarity Framework 137

Meetings and More

MEETINGS

Dana Wright Wasson
In Defense of Meetings 147

Nevada Lane
Visual Meeting Warm-ups 153

Mia Liljeberg
Presentation Skills: Let the Picture Do the Job 161

Rosanna von Sacken and Jenny Trautman
Multi-Sensory Facilitation Tools and Applications 169

Sam Bradd
The Camera as a Visual Tool to Close a Meeting 177

LARGE SCALE MEETINGS

Tomohide Oshima and Sabine Soeder
Visuals in World Café:
How to Prepare, Host, and Harvest 181

Sabine Soeder
Co-Creation of the First Tirolean Entrepreneurs' Day in Austria 189

Tomohide Oshima
A Multilocation World Café in Japan:
Big Plans for a Big Visual Event 199

Sam Bradd
Visuals at Large Events 211

VISUAL LISTENING
Anthony Weeks
Centering Listening in Visual Practice 221

Sophia Liang
Tackling Our Listening Mindset 229

Brandy Agerbeck
The Value of Visual Organization 239

Julie Stuart
Sensing into Emergence 253

DIALOGUE
Gerauld Wong
What Do You Mean?!
Creating Purposeful Dialogue from Visuals 263

Tracey Ezard
Conversations that Matter:
Visual Collaboration among Educators 273

Matthew Magain
Better Communication with the Empathy Forecast 285

IMAGES AND STORIES
Sophia Liang
The Metaphor in Visual Practice 293

Anthony Weeks
Is Your Metaphor a Box or a Catalyst? 304

Anthony Weeks
Facilitating for Story 305

Tiffany Forner
Storymap Project Lessons:
A Designer's Perspective 315

Renate Kenter
IMAGEning the Future 329

TEMPLATES
Lynn Carruthers
The Joy of Templates 339

Jill Greenbaum
Coaching with Templates 347

Dana Wright Wasson
Creating Impactful Employee Engagement
with Templates 355

TEAM PERFORMANCE
Laurie Durnell
How to Get Teams Unstuck Using Visuals 363

Jeannel King
One Visual Meeting Creates One Huge Shift 371

Beyond the Paper

VIRTUAL AND VISUAL
Holger Nils Pohl
The Case for Digital Facilitation 381

Comparing Paper and Digital Media 387

Holger Nils Pohl
App Magic: Presenting and
Facilitating Using Digital Media 389

Jerre Lubberts
Live Digital Mapping 395

Amy Lenzo
Connection, Collaboration, Creativity: Using Visuals
for Online Engagement 405

OFF THE PAPER
Brian Tarallo
Visual Facilitation in 3D 415

Greg Whicker
Creating Immersive Visual Environments 425

Dean Meyers
Facilitating with All Hands at Play 431

Marsha Acker
Using the Geography of the
Room to Access Collective Intelligence 439

Matthew Magain
A Bulletproof Process to Creating Sketch Videos 449

Matthew Magain
Shooting a Sketch Video: Tips and Tricks 459

Pro Stories

VISUALS IN ACTION

Tul Lekutai
My Journey as a Visual Facilitator:
From Buildings to Court Rooms 471

Julie Stuart
Creating a Visually Immersive Experience
from Start to Finish 477

Tomoko Tamaari
Visuals for Recovery: A Story of the
Great Eastern Japan Earthquake 485

Philip Guo
Digital Graphic Recording,
Live on Chinese Television 491

Jillian Lee
Future Heroes: Graphic Facilitation
for Industry 4.0 499

Jill Greenbaum
My Journey as a Visual Facilitator 511

Frank Wesseler
Understanding Business Processes
through Visualization 517

INTERSECTION WITH OTHER FIELDS

Ben Tinker
Honoring People and Process through Visuals 531

Dean Meyers
Facilitating Human-Centered Design:
People Come First 543

Lisa Arora
Visuals Meet Mediation 555

Lynne Cazaly
Agile Ways of Working 563

Marko Hamel
Visual Selling®: RethINK Customer
ConversationsOn Paper and Digitally 575

Marko Hamel
The 13 Most Common Visual Selling
Pitfalls and How to Avoid Them 587

Your Future as a Visual Facilitator

Trent Wakenight
Future of the Field: Introduction 599

Mathias Weitbrecht
Future Casting Our Field 601

Kelvy Bird
Attending to Tone 609

Michelle Walker
The Growing Edge for Visual Practitioners 617

Sabine Soeder and Mary Alice Arthur
An Integrated Approach to
Visual Facilitation of the Future 627

Trent Wakenight
Future of the Field: Conclusion 635

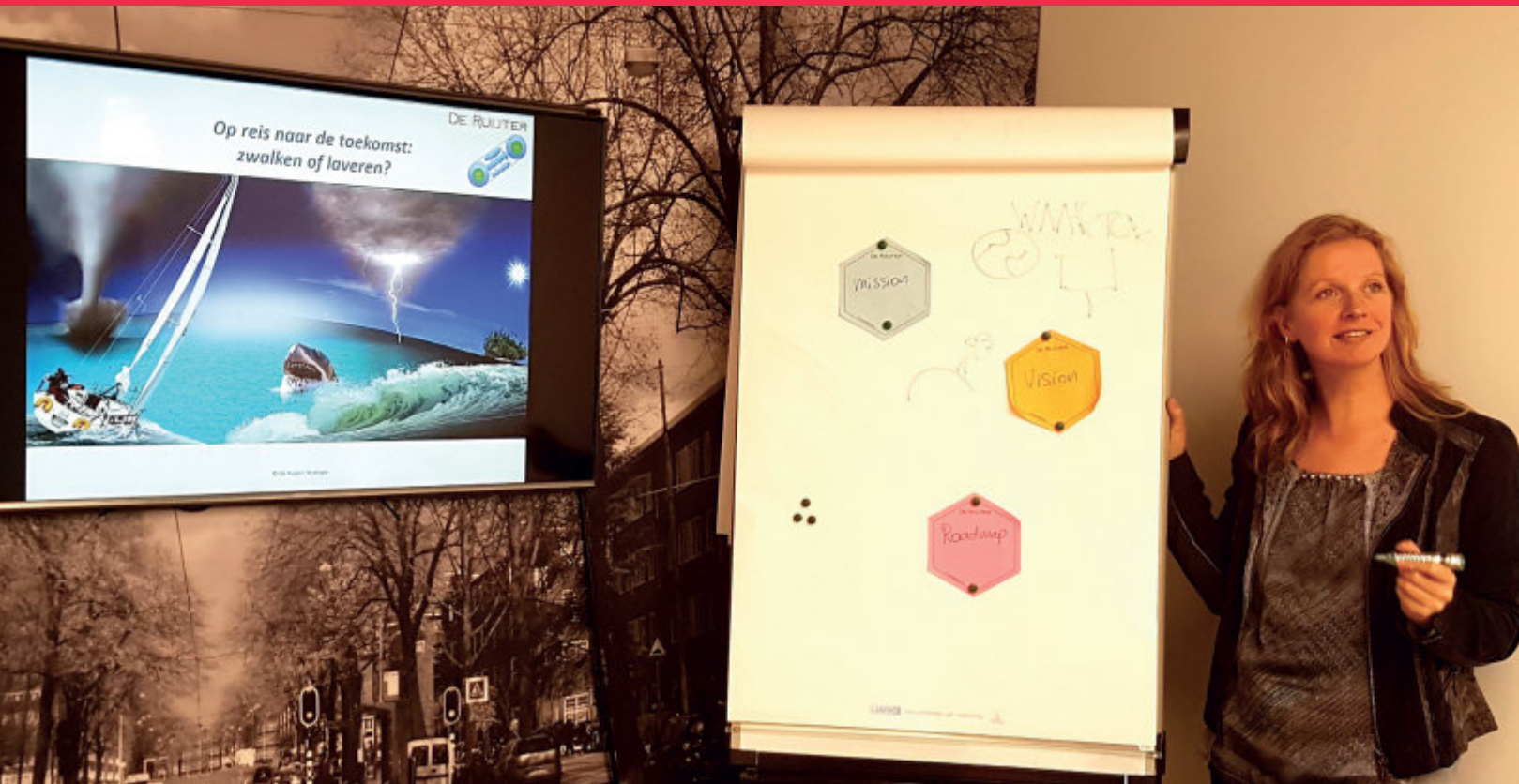
About The Editors And Co-Authors 637
Index 647

Renate Kenter

IMAGEning THE FUTURE

We cannot predict the future, but we can try to imagine it. In this chapter we'll describe the application of visual facilitation in a scenario-based, strategic approach, and discuss how you can use scenario-based strategies in your work.

Images and Stories



SCENARIO-BASED STRATEGY: IMAGEning THE FUTURE

WHY NAVIGATE THE FUTURE?

The decisions people make today impact and shape the future. Very often, we base our decisions on empirical science, and thus on data and experiences of the past. This helps us form an understanding of the present, but doesn't necessarily predict the future. Despite the saying that history repeats itself, the future always differs significantly from the past. We need more than empirical science to inform our decisions. We need a different approach. And this is exactly what scenario thinking provides.

As an international relations student in the late nineties, I got hooked on scenario-based thinking. International relations is about political and economic relations between states—about war and peace. We spent a lot of time studying various scholars who'd analyzed and interpreted the past, but I felt something was missing. We needn't be preparing for the last struggle; we should be preparing for the next one! We should want to anticipate rather than react; we should be considering the consequences of our deeds in advance. Lastly, we should want to know how the decisions we make today might play out in the long term. Therefore, it is vital for a business, government, or social organization to explore and imagine the future in numerous ways. We must consider multiple scenarios, because the future is uncertain and can unfold in many directions.

Scenario thinking is not a scientific process, but rather a creative one. When we explore the future with our clients in a collaborative process, we try to create a shared image. However, there are no data, photos, or film fragments of the future. We can, of course, describe these imagined future scenarios in text, but words cannot provide a complete picture.

A drawing (or other form of visualization) can significantly help to create and share images about the future. It is one thing to read a story; it is another to experience the future through visuals; like drawings, animation, or film.

There are two types of futures. One future happens to us because of external circumstances. The other future we can try to develop and shape by taking action. Our method for strategy development supports thinking about both kinds of futures. *Scenario planning* helps us navigate the external future. *Visioning* helps us shape the future we can create. And it always starts with an image.

If I ask you to imagine your life two years from now, you might see pictures of it in your mind. Visualizing our future goals, and how we are going to meet them, actually helps us achieve these goals. Strategy development for organizations works much the same. Thus, visual facilitation combined with group activities designed to tap into participants' imaginations makes perfect sense.

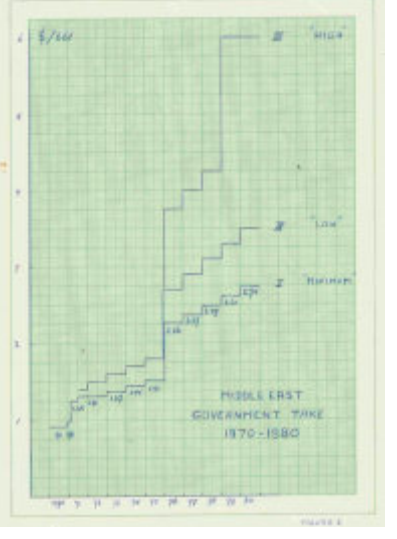


Image 1: Henk Alkema's original oil price scenarios for Shell.[1]

1 Photograph from Paul de Ruijter's article, "Valuing Uncertainty Using Disruptive Scenarios and Real Options."

History of Scenario Thinking in Business

Henk Alkema, of Shell Chemical LP (Shell), was one of the first people to use scenario thinking in business. He developed and visualized the first scenarios regarding possible increases in oil prices (see Image 1).

These predictions became a success. By anticipating a plausible oil crisis prior to 1973, Shell managed to treat the actual oil crisis as an opportunity rather than a threat. As a result, Shell emerged from the oil crisis much higher on the list of largest players than it had been previously. Since then, Shell, along with many other organizations and governments, have used this way of thinking for their strategic, decision-making process.

THE METAPHOR IN VISUAL PRACTICE

When discussing strategy with our clients, we base our process design on the *scenario-based strategy method* we have developed in our practice at De Ruijter Strategy[2] over the last fifteen years. It is described in the book *Scenario Based Strategy: Navigating the Future*, by Paul de Ruijter with Henk Alkema. This method distinguishes a number of strategic conversations for organizations, visualized in a model and visual metaphor.

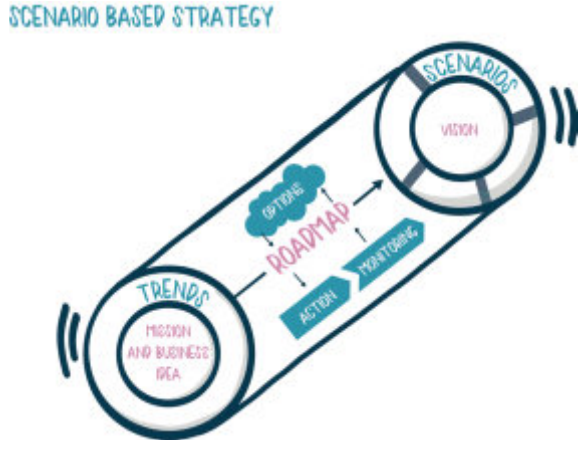


Figure 1: Scenario-based strategy model.

Image 2: A visual metaphor for a scenario-based strategy: navigating the future.

We share this visual metaphor illustrating our method with every client at the beginning of engagements. We use it to introduce the concepts we intend to employ. We have learned that a visual metaphor is significantly more effective in engaging participants than is simply presenting a model. (For more on metaphors, see Sophia Liang's chapter entitled, *The Metaphor in Visual Practice*.)

Initially, we only reveal the boat and the island, introducing the first two conversations about *mission* and *vision*. We interact with our client during this phase, instructing participants to imagine they are sailing on this boat; we ask about the purpose of their journey. Is it just for fun? Is it a competition?

Are they trying to win a contest by reaching the island first? Then we click our mouse and the tornado appears.We use future weather conditions we may encounter to introduce the concept of *scenarios*. When we get to the fog, we ask participants whether this situation is good or bad, and why. We use the visual to build up the story about our method, actively involving everyone on our imaginary boat ride. Finally, the Jaws-like shark appears. This usually makes people laugh. By this time, the participants are engaged on both a cognitive and emotional level. This combination helps people remember the presentation. (As an alternative to PowerPoint, you might draw the elements on a flipchart, building up the picture while explaining the method.)

2 For more on De Ruijter's Strategy, visit: www.deruijter.net/home-en.html.

UNPACKING THE METAPHOR

All the elements in the picture illustrating our method are explained thoroughly to our client, but for the purposes of this chapter, we'll focus on the parts containing *scenario planning*.

The sailboat symbolizes *mission*. This is the strategic conversation about the purpose of an organization, an individual, or a group of people trying to achieve something. It includes core values, *raison d'etre*, and the success formula thus far. The island on the horizon symbolizes *vision*. What is our destination? What do we want to achieve? Where (or what) do we want to be in the future?

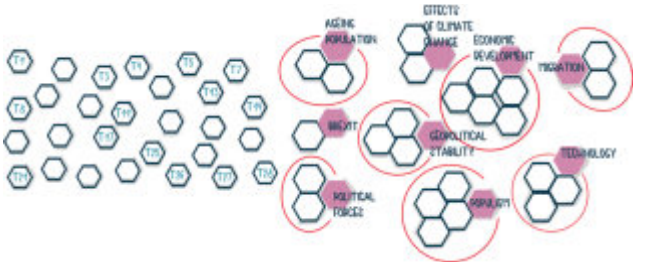


Figure 2: After a brainstorming session, trends were clustered into key variables that would shape the future environment of Europe.

SCENARIO PLANNING

The weather conditions that appear in the picture symbolize *scenarios*, future circumstances in which we might find ourselves. Circumstances we cannot control (symbolized by unpredictable weather), even though they might impact us greatly. To illustrate our process, I've adapted a scenario project we completed for the Network of European Citizenship Education in 2014 about the future of Europe. Below are the steps we followed.:

Explore Relevant Developments and Trends.
Start with the exploration of relevant external developments and trends in the organization's environment. This can be done through a brainstorm session during a trend workshop, or by conducting background research and interviews (preferably in tandem with members of the client's organization).

Trends reveal details about the past and present, but they don't predict the future. Trends are based on data, and there are no data for the future. Although some developments are easier to predict than others, we believe the future as a whole to be fundamentally uncertain. That is why we prefer using scenarios over forecasts.

Identify Key External Uncertainties.
Key external uncertainties are situations with both a high uncertainty and a high impact. Together with the client, determine what the key external uncertainties are for their organization. These key uncertainties form the basis of the scenarios.

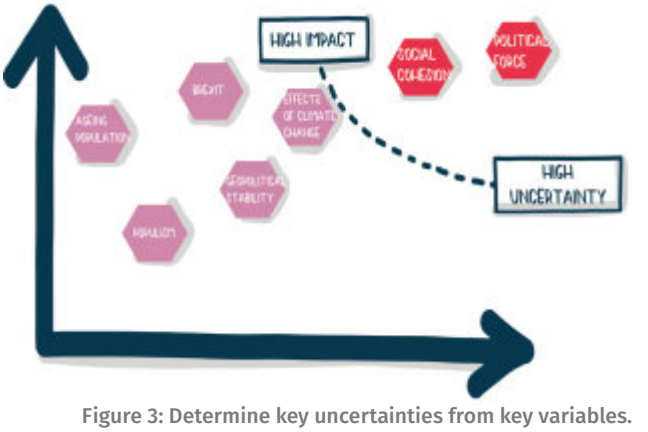


Figure 3: Determine key uncertainties from key variables.

Conduct a Scenario Workshop.
Next, organize a *scenario workshop*, preferably with participants both inside and outside the organization. Ideally, we want to get the whole system in the room. If all stakeholders are present, we'll have all the relevant perspectives on their shared future context. (Unfortunately, this is rarely possible, so we make do with the participants we have.) During these workshops, tap into people's imagination and capabilities for reasoning by asking them to create relevant, logically consistent stories about plausible future situations and how they might arise. We start each scenario from an extreme outcome of the key uncertainties. This gives us the scenario framework.

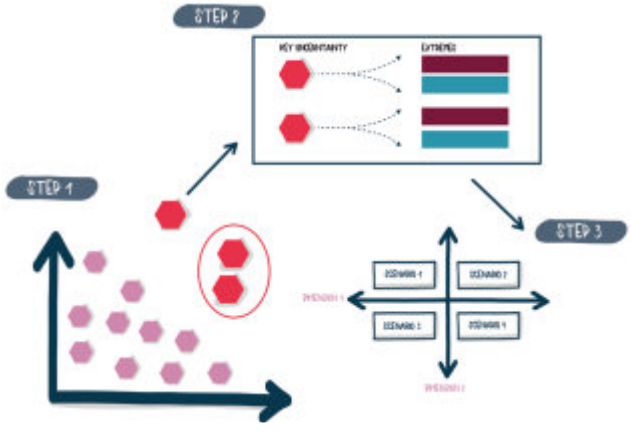


Figure 4: From key uncertainties to scenario framework.

We then combine this frame with the other developments found in the exploration of the environment. For example, when thinking about possible future situations, consider the visual of our shark. He symbolizes the *transactional environment*, like competitors or other players in the field. How will they act in each scenario? How will those actions affect our client's organization? Create a set of three or four plausible, relevant (to your client), novel scenarios that provide new insights into future challenges, opportunities, and playing-field dynamics.

Figure 5: This example shows various scenarios about the future of Europe.

Generate Strategic Options and Stress Test Current Plans.
Use the created scenarios to generate *strategic options for action* and to stress test your client's current plans to assess whether or not they are future-proof.

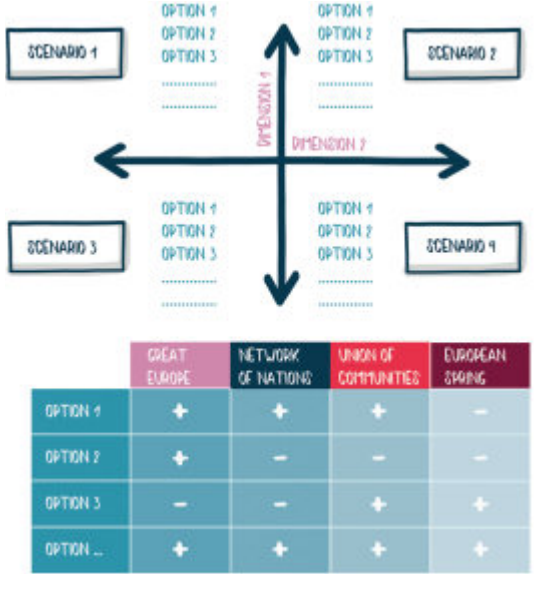


Figure 6: From scenarios to options: identifying problems helps create solutions.

At this stage in the process, all results from the strategic conversations held thus far are used as input for the creation of the actual strategy. In an iterative process with the client, the actual strategy

is written out on a roadmap. The roadmap is not a singular linear plan, but consists of multiple paths leading to the vision, taking the still-uncertain (but possible) future conditions (scenarios) into account.

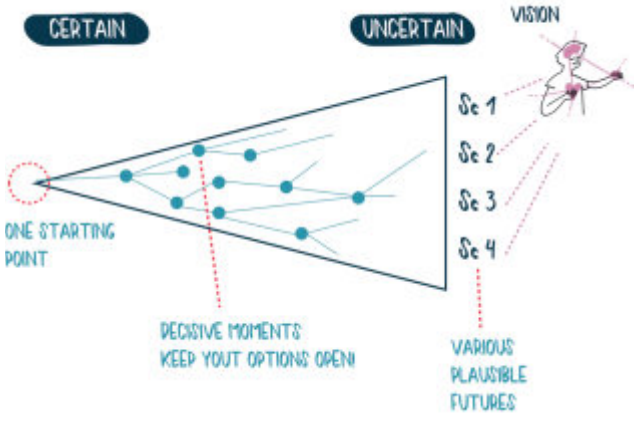


Figure 7: Roadmap of a dynamic strategy.

Once we are moving in real time, it is important to *monitor* both the external and internal environments. To monitor the external environment, we ask, "What are the circumstances really like, and do they resemble one or more of the scenarios?" Our internal monitoring question asks, "Are we still on track with executing our mission and moving toward our vision?" Answering these questions helps our client decide which path to actually take, given the real circumstances in which they will find themselves. By imaging multiple scenarios, we help our clients, through simulation, to proactively prepare for the uncertain future and draw up a *resilient strategy* with built-in *agility*. They can adapt to shifting circumstances and still remain on track.

TIPS FOR EMPOWERING YOUR PARTICIPANTS TO EXPRESS THEMSELVES IN IMAGES

When creating scenarios, let people who don't like to draw use other visual techniques, like icons made from clip art, pictures from magazines, photographs, or video.

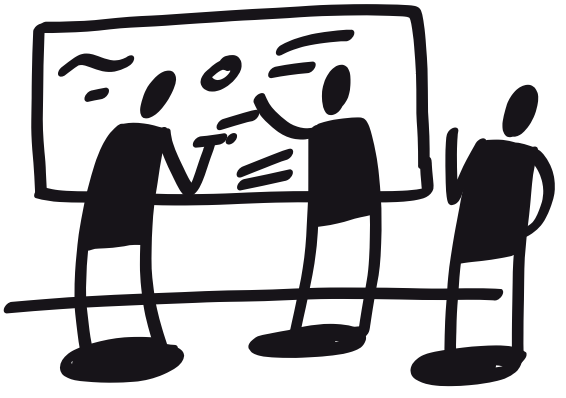
- Introduce people to drawing and let them practice. Consider an instructional video,like "Learning Graphic Facilitation - 7 Elements," from BiggerPictureVideo[3] (available on *YouTube*).

CASE STUDY: SCENARIOS ON ENERGY EFFICIENCY IN BUILDINGS BY 2050

The next case discussed pertains to the 2013 *Agreement on Energy for Sustainable Growth*.[4] This particular example highlights two important facts.

1. To create valuable content about the future, both graphic facilitation and visualization are extremely powerful tools to incite participants' much needed creativity and imagination.

2. Both graphic facilitation and visualization provide meaningful ways to transfer and communicate complex content in a way that enables participants to assimilate and use the information.



3 "Learning Graphic Facilitation - 7 Elements." *YouTube*, uploaded by BiggerPictureVideo, 5 June 2013, bit.ly/BigPic7Elements.
4 For an English translation summarizing the *Agreement on Energy for Sustainable Growth*, see www.energieakkoordser.nl/doen/engels.aspx.

About the Project

What will the future of energy in the man-made environment look like in the coming decades?

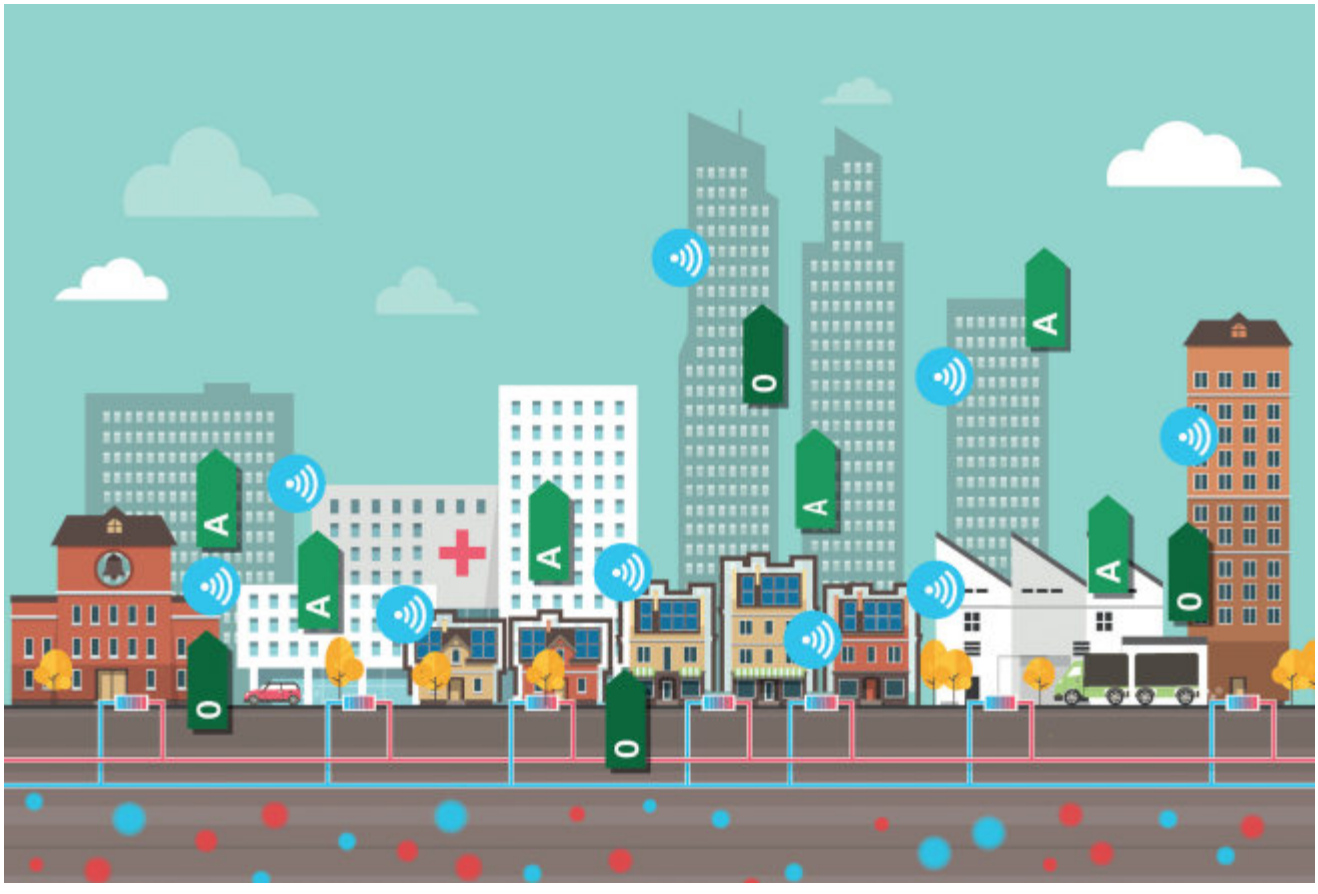


Image 3: A sustainable man-made environment for the future.

The 2013 Agreement on Energy for Sustainable Growth marked the start of the transition to a sustainable future in the Netherlands. Part of this agreement pertained to the built (man-made) environment—all buildings must have an A label energy performance by 2030, and must be energy-neutral by 2050.

In preparation of meeting this goal, in 2015 the Ministry of Interior Affairs started a long-term survey on energy in the built environment. The goal of the survey was to enable the Ministry to identify opportunities, obstacles, and options for energy supply in buildings, thereby enabling stakeholders to design and align their strategies to realize a zero net-energy built environment. An important building block for this long-term survey was the development of scenarios regarding the future of energy efficiency in buildings by 2050.

Our Approach

In order to create plausible, relevant, and insightful scenarios on the future of energy efficiency in buildings, we needed to explore long-term developments and uncertainties. What might we expect to happen in the next decades from a demographic, economical,

social, technological, and ecological point of view? What might the playing field look like? Which parties might play a role, and what might be the rules of the game? These questions were answered through background research, interviews, and a trend workshop.

We needed to share the results of this vast exploration in workshops with limited time, and without losing too much of the complexity involved. Visualization came to our aid. We created a visual template of a model previously developed at the Oxford Futures Forum in 2011 (in which we took part).

Image 4: Trends and dynamics in the man-made environment of the Netherlands.

The model divided the world into physical, social, and conceptual layers. This allowed us to portray all the developments we discovered (the yellow sticky notes), and show the dynamics between these developments and the actors involved in specific parts of the built environment (the orange sticky notes) in multiple layers. Participants could add to this by attaching additional (green) sticky notes in place. The results were also written up in an elaborate report, but without the visualization we wouldn't have been able to share them in such a comprehensive way (without vastly oversimplifying).

Based on the results of this exploratory phase, we developed four scenarios during an interactive process. We included delegates from residential and commercial building contractors, energy companies, installers, architects, and knowledgeable institutions.

We used graphic facilitation in our workshops. After allowing participants some practice time with the "Learning Graphic Facilitation - 7 Elements" video (referenced earlier), we divided the group into four smaller groups, one for each scenario. We asked each group to draw versions of their respective scenarios.

Images 5 and 6: Participants drew their future scenarios illustrating the transition toward a sustainable, man-made environment in the Netherlands.

At the end of the workshop, each group presented their future scenario by telling the story that corresponded with their drawing. We recorded the presentations and used them as input for the final scenarios.

The Results

All four scenarios assumed a definite transition to a zero net-energy built environment, as described in the objectives of the Agreement on Energy for Sustainable Growth.

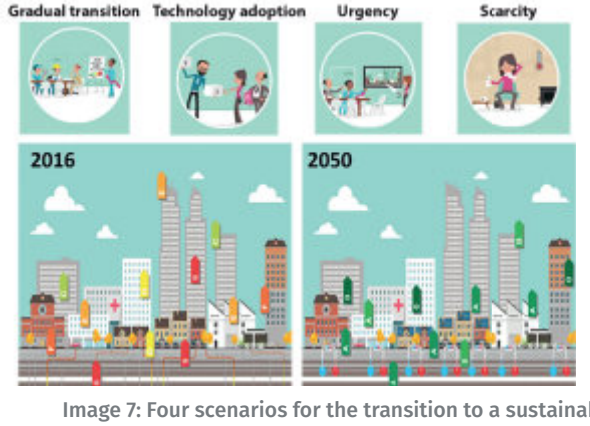


Image 7: Four scenarios for the transition to a sustainable man-made environment in the Netherlands.

The four scenarios were as follows:

1. *Gradual Transition*. This scenario described a step-by-step transition to a zero net-energy built environment, elaborating on current developments in energy efficiency, and focusing on collective agreements. Currently, the *gradual transition* scenario is closest to reality. However, the participants saw various developments that could accelerate the gradual transition to zero net-energy buildings. These developments are described in the remaining scenarios.

2. *Technology Adoption*. This scenario might occur if user-friendly innovations in energy efficiency become affordable and attractive to a growing number of people.

3. *Urgency.* If society as a whole felt an increasing urge to take drastic measures to fight climate change, our transition might be accelerated.

4. *Scarcity*. If the worldwide growing demand for fossil fuels led to limited availability and higher prices, the energy used in the built environment might lessen by necessity.

In the next step of the process, the scenarios were written up in a report and visualized in an animated video. This video was used in a number of workshops referred to as *option workshops*. During these sessions, various groups of stakeholders (who actually have to make the transition to zero net-energy happen) brainstormed policy options for the government and actionable options for themselves. The groups included installation companies, representatives of homeowner organizations, building societies, real estate investors, and so on. The animated video proved to be really effective in helping participants imagine different scenarios, especially for people who had participated in the scenario-making process. All that remains now is for everyone to start acting for real, to turn our shared vision of a zero net-energy built environment into reality!

Regardless of your client's dreams and goals, I'm confident that scenario-based planning sessions will help you illuminate and guide their future path.

WORKS CITED:

"Agreement on Energy for Sustainable Growth." *Sociaal-Economische Raad (SER),* www.energieakkoordser.nl/doen/engels.aspx. Accessed 23 Jan. 2019.

De Ruijter, Paul. *Scenario Based Strategy: Navigating the Future.* Routledge, 2014.

De Ruijter, Paul. "Valuing Uncertainty Using Disruptive Scenarios and Real Options." *VBA: Beleggingsprofessionals Journaal*, Vol. 130, Jan. 2017, pp. 6-9.

"Learning Graphic Facilitation - 7 Elements." *YouTube*, uploaded by BiggerPictureVideo, 5 June 2013, bit.ly/BigPic7Elements.

De Ruijter Strategy. De Ruijter Strategy, www.deruijter.net/home-en.html. Accessed 23 Jan. 2019.

"Learning Graphic Facilitation — 7 Elements." *YouTube,* uploaded by BiggerPictureVideo, 5 June 2013, bit.ly/BigPic7Elements.