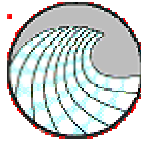




International Association of Facilitators  
The Art and Mastery of Facilitation – Worlds of Change  
Toronto, Ontario, Canada  
April 27 – 30, 2000



World of Diverse Perspectives

## USING GRAPHIC FACILITATION

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### **Abstract**

This article explores the application of visualization and graphic techniques to meetings and group processes where people undertake collective tasks. Graphic techniques can be used effectively to address common group facilitation challenges, such as cognitive overload. The article shows how very simple graphic applications can reduce confusion in meetings, and explores how process orientation maps can increase understanding and alignment among participants at the beginning of long training programs and complex work projects.

### **1. Introduction**

Facilitation is emerging as a recognized social and professional skill, and we are increasingly looking for ways to enhance and perfect our ability to facilitate groups of people in working together more creatively and collaboratively. Facilitation may turn out to be the ‘core human competency’ of the early 21st century, as we discover that solving complex problems and producing new and healthier orders of life increasingly demand that, more than anything else, we



learn how to collaborate at every level of social and intellectual life. The emergence of facilitation may correspond with the ending of an age in which the paradigm of individualism dominated our thinking, largely I believe, at the expense of our collective intelligence.

One trend in facilitation involves the use of graphic techniques and visualized models to enhance the work of groups. As a former commercial illustrator and designer who in the 80's moved into OD consulting, training, and facilitation work, it has been second nature for me to bring graphic skills to group work. What surprises me is, first, how much it improves meetings and collaborative efforts, and second, how little it is utilized.

## **2. Challenges of Facilitating Group Work**

Consider the major challenges of facilitation. These become evident as we attempt to undertake more complex tasks, with more people, more democratically. With many people, many viewpoints, complex information and systems relationships, there is an ever present need for simplification and clarity. Too much information is a chronic issue - we can track only so many ideas or conversations at one time. In short, we suffer from cognitive overload.

In many meetings, we experience a sense of crowding, or a feeling of competition. As participants, we may struggle to be heard and to have our individual viewpoints acknowledged and addressed. Internally, we may experience a competition for our limited attentional resources, trying to track what is happening inside us (thoughts and feelings) as well as outside us - what others are saying and doing. Under such circumstances there is a decline in the quality of our communication, and thus our individual and collective learning.

In this article I want to explore some ways that the process of visualization and the use of graphics can effectively address these challenges. A clarification of terminology: visualization implies the mental process of making images and 'seeing' structures and relationships. Graphics,

or graphic structures, are the visible product of such visualization. Keeping that distinction in mind, I shall use the words 'graphics' and 'visualization' somewhat interchangeably here.

### **3. Background**

Graphic facilitation is not a new idea. David Sibbett and his colleagues pioneered this work beginning in the 1970's. His 1980 book, *I See What You Mean*, lays out a sophisticated taxonomy of graphic structures that can be used for a wide variety of group tasks and processes. This original work has evolved into the extensive collection of graphic templates marketed by Grove Consultants. More recently others have also done significant work in applying graphic approaches to group work. Bernie DeKoven has evolved something called Technography, which integrates a visual approach with the power of digital electronic technology to enhance meeting processes.

Yet in spite of this work, I regularly see that the potential of graphics in group process is not only unfulfilled but often not even recognized. Even professional facilitators who are aware that such approaches exist generally make only minimal use of them. Although anyone can easily purchase prepared graphic templates for various meeting tasks from places like Grove Consultants, I believe the real power of graphics to enhance our collective intelligence will only be realized when facilitators (and that

could be any participant in group work) become comfortable in creating their own graphic structures to address the myriad of meeting tasks and situations with which they deal. In a word, I see the need for a more distributed understanding of how graphics can be used in our work together.

In this article I discuss two areas where the application or expansion of graphic concepts and techniques promises to substantially improve the quality of meetings and group processes.



First, I think we need to recognize how more use of the very simplest graphic structures can help clarify our collective thinking and shared understanding. Second, the use of process orientation maps can let people know what will happen in group events, and how they can most effectively participate.

#### **4. The Basics: What Are Graphics?**

Too often, even those who are aware of the concept of graphic facilitation believe it involves specialized drawing skills which they don't possess or may not have time to learn. While the term 'graphics' could imply the use of elaborate and skillfully designed images, it is essential to recognize that we are using graphics as soon as we begin to place written, printed, or projected words in some kind of meaningful spatial relationship, beyond simple linear text. Two columns of words, itemizing the pros and cons of an issue, is an elementary but valuable graphic.

#### **5. The Circle**

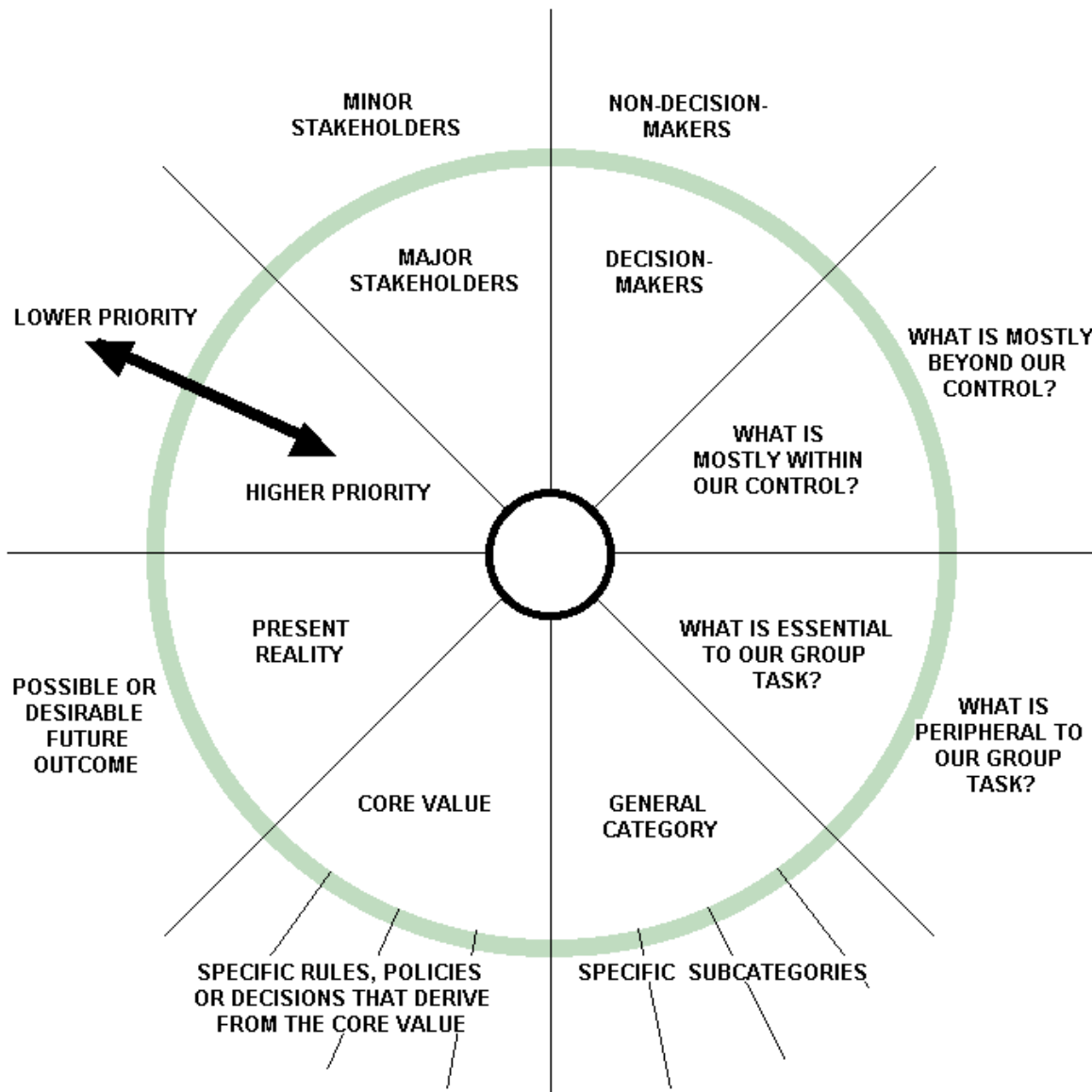
Two of the simplest and most powerful graphic structures, available to even the most resolutely 'drawing-impaired', are the line and the circle. Take the circle. It has several useful qualities - endless continuity, a center, and an inside and outside. These qualities make it an ideal container for representing a wide variety of group process issues. Most people intuitively recognize that it can represent wholeness, or unity - important reminders for group work. And the center is a visual reminder of the need to focus our group attention.

Now add to that the inside-outside structure. This can be employed to represent all sorts of things, as shown in figure 1. The words in this diagram are all simple dichotomies which everyone easily grasps, yet time and again I have seen meetings where a great deal of energy was wasted in confusion because those dichotomies, which could have clarified the relation of

individual ideas or activities to the overall task of the meeting, were not clearly identified and effectively shared.

## FIGURE 1 THE CIRCLE AS AN INSIDE-OUTSIDE STRUCTURE

EXAMPLES OF TASK OR GROUP PROCESS RELATED DISTINCTIONS THAT LEAD THEMSELVES TO BEING REPRESENTED AND RECORDED USING A CIRCLE GRAPHIC

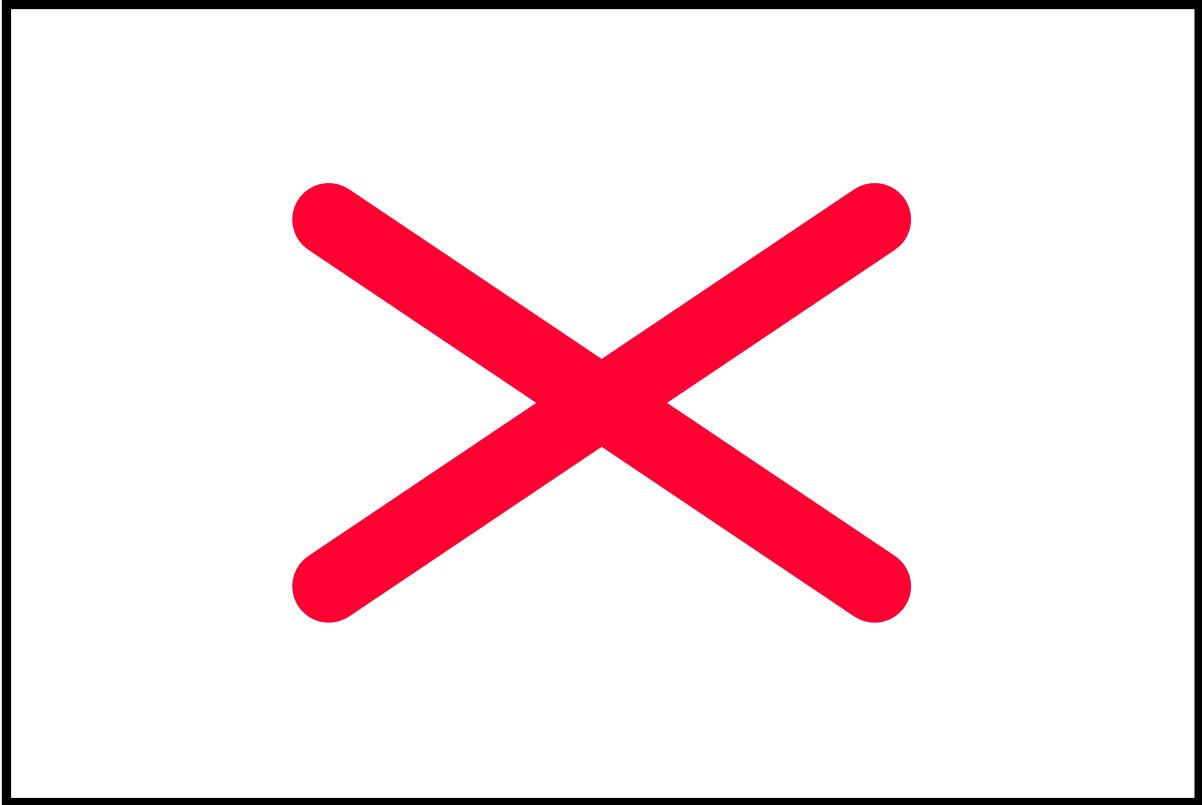


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The important point here is that the use of graphics doesn't necessarily demand a highly skillful visual talent. We simply need to ask, What are the distinctions, or relationships, that are important for the purposes of this meeting? and then, What is a simple graphic structure that might represent those distinctions in a way that could accurately incorporate input from group members? Drawing these structures is easy, but in doing so we may be forced to clarify the relationships among our ideas, which may be quite challenging, and thus may often be the key to provoking a breakthrough and making our collective work successful.

The circle is also a versatile shape for presenting various models of human psychology or behavior that may be relevant for group work. Figure 2 shows the learning model developed by David Kolb and elaborated by Bernice McCarthy. I recently posted a wall sized version of this graphic model during a curriculum revision meeting. The graphic proved a simple but astonishingly powerful tool to organize our thinking about how to evaluate, arrange, and present the scores of different modules that made up the week-long training program. I find that very often such clear graphic models can keep us connected to the overview of what we are trying to accomplish, when otherwise we would fall into the temptation to engage in numerous fragmented discussions of details and end up with some nicely designed pieces at the expense of overall program coherence and rhythm.

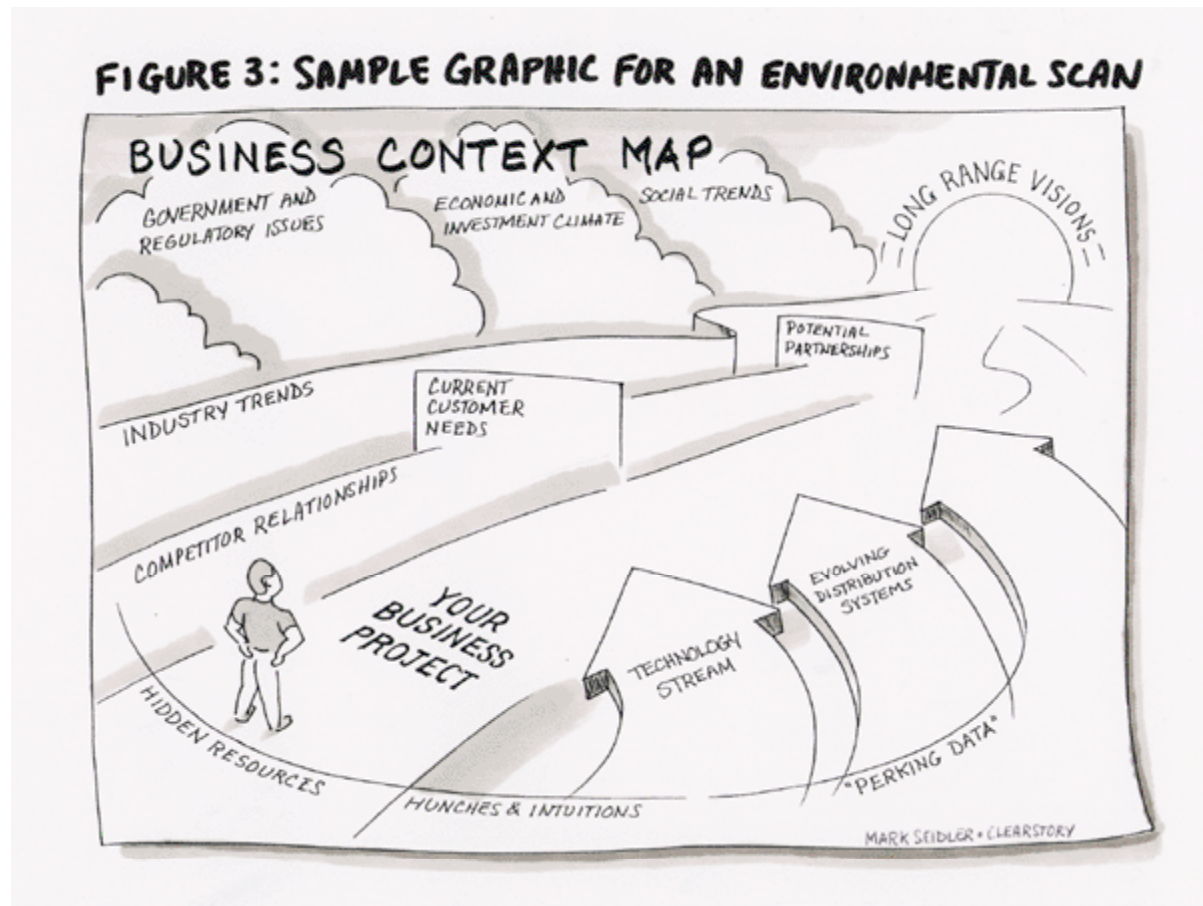


## 6. The Map

The 'Map' is another fundamental graphic structure. Basically it is nothing more than a two dimensional writing and drawing space - a plane - where a variety of facts, concerns, ideas or activities can be not only recorded but placed in visual relationship with each other. In a group process, it can relieve cognitive overload by containing a great amount of data while allowing individuals to 'navigate' in that data field, and to explore relationships in their own time and way. When used interactively, group members can participate in rearranging individual items to reflect group understanding.

Figure 3 is an example of map designed to gather the collective knowledge and experience of partners or team members embarking on a business project, a kind of environmental scan. The categories labeled on the map are only suggestions: knowledgeable

participants should personalize such maps by modifying them to meet their own needs and understanding.



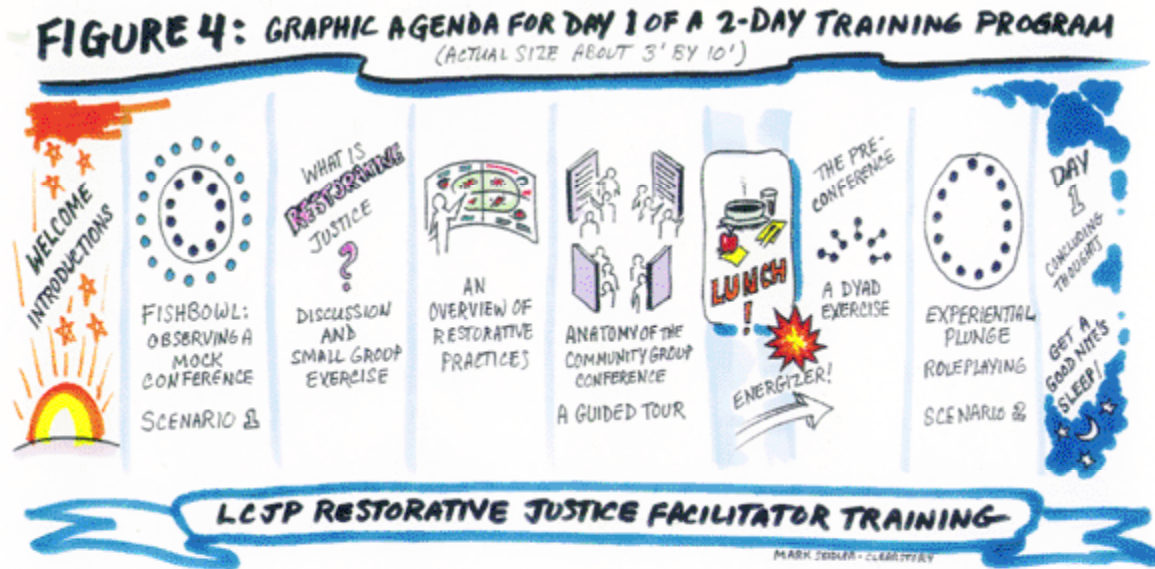
Thus what simple graphic structures can add is not just ‘visual relief’ to word-processing overload (eg, use of colors, interesting bullet symbols), but more significantly, an organizing conceptual structure that lets us quickly grasp relationships among ideas, issues, or choices; see new possibilities; and give us a ‘big picture’ framework that supports more informed judgments and better decision making.

### 7. Process Orientation Maps

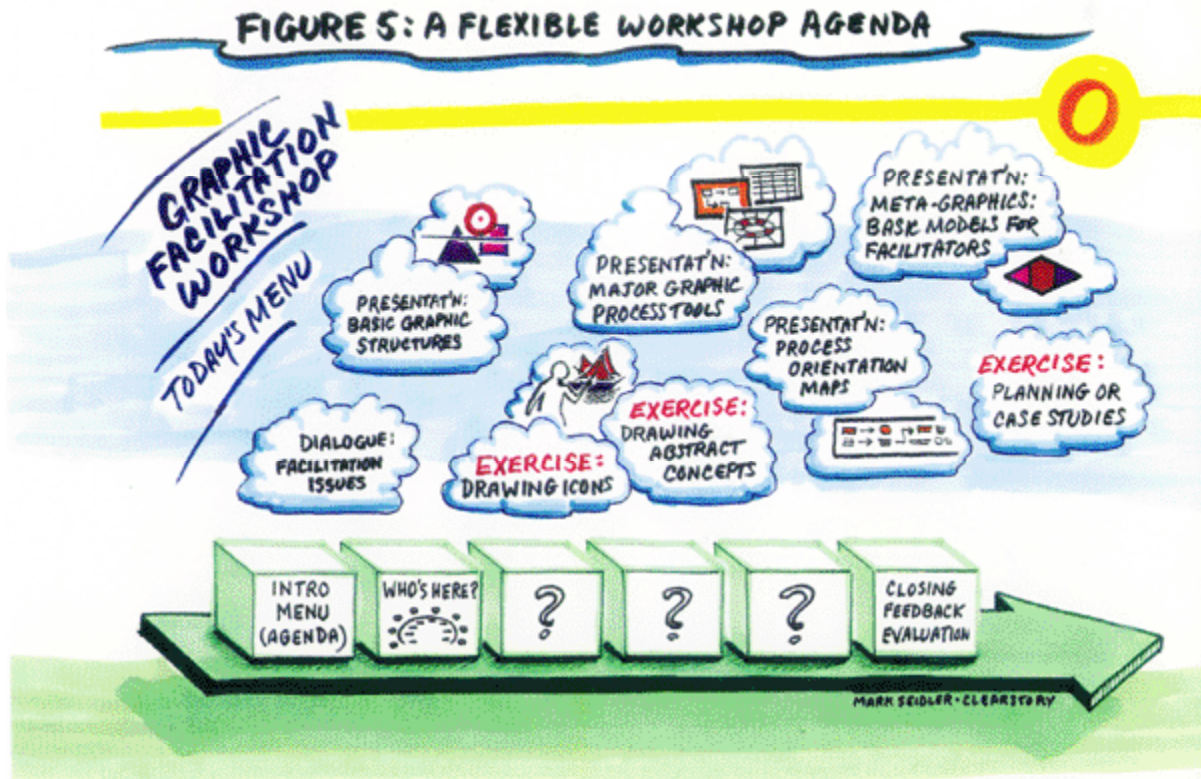
Another kind of map emphasizes a chronological sequence of activities, tasks, goals, or learning objectives. Its purpose is to let people know what to expect at the beginning of any

group event - a long meeting, a training program, or a work project. We can easily provide such process orientation maps, which use a visual format to tell and show people what the plan is for the event or process. If appropriate, these maps can be presented as ‘drafts’, designed to be interactive by inviting participant input in modifying the plan for the event.

Conscientious facilitators, trainers, and project managers commonly provide process orientation with simple written agendas. Such simple lists are often quite sufficient, but where an event involves a substantial variation of both activities and content areas (as in some experiential training programs), or involves complex interactions among team members or stakeholders (as in many work projects), I find that a more visual orientation map (sometimes called a graphic agenda) can be very helpful. For many training programs that I conduct, I use colored markers on a long sheet of newsprint to both label and illustrate the sequence of activities for the day (figure 4). Participants love it. (And in regard to the use of color, a process-conscious friend of mind reminds me, “Black and white puts me to sleep, color wakes me up.”)

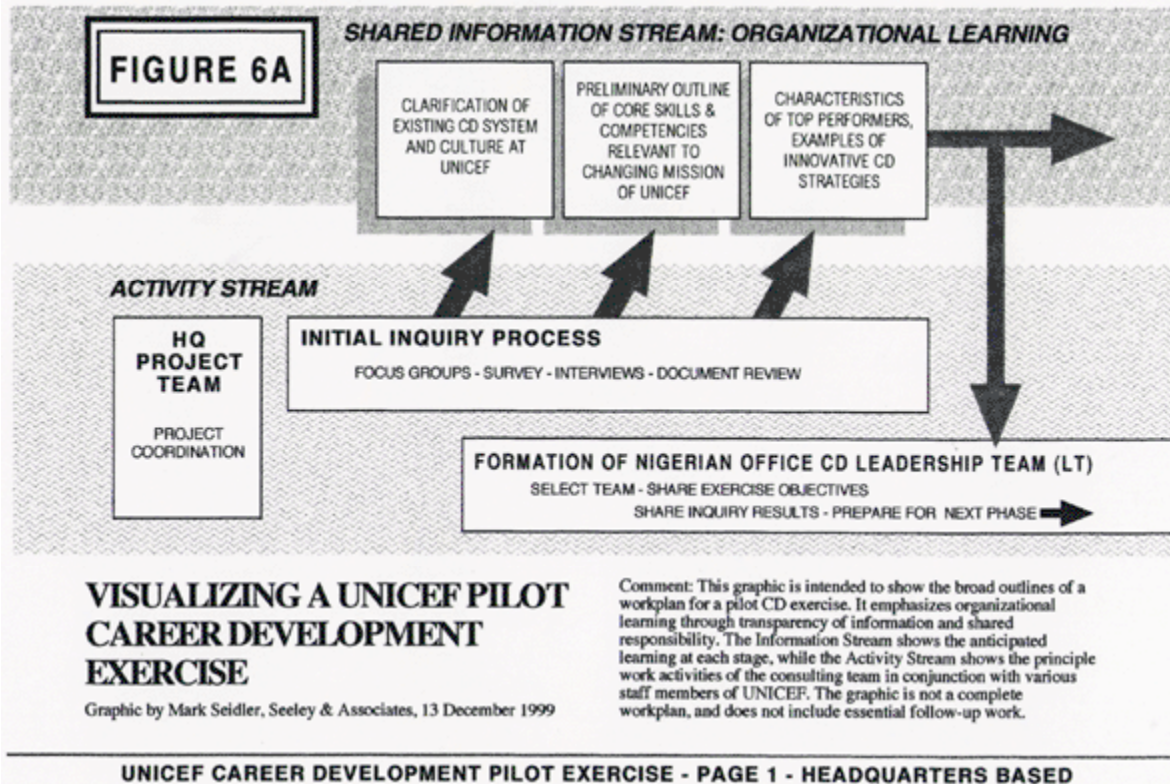


Process orientation maps can be used very effectively to get participant agreement on what will best suit their needs. I recently presented a 4 hour workshop on graphic facilitation where I had a potential 6 or 8 hours of material. I didn't know in advance what would be most relevant for the participants, a group of professional public-sector facilitators. So I created a graphic 'menu' which allowed them to quickly grasp what might be offered, and then to discuss and vote on what they wanted to focus on during our limited time (figure 5). Interestingly, in terms of their group process, the map also played a role in letting them modify their choices later in the workshop as their learning needs and discoveries unfolded.

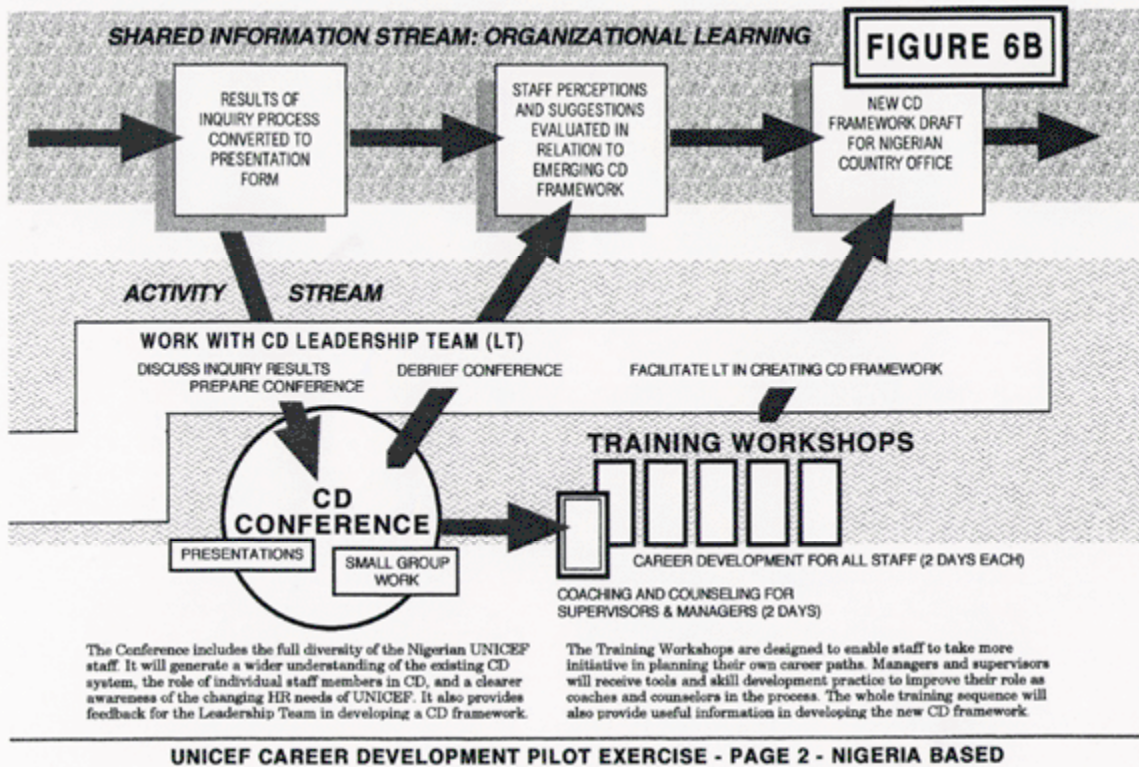


## 8. Process Orientation For Large Scale Projects

Such maps can also be used to provide orientation for much larger organizational events - work projects which may take place over months and involve numerous personnel in widely scattered locations. Figure 6 shows a process orientation map for a work proposal which a colleague and I recently submitted to a United Nations Agency. It offers a broad overview for a proposed series of interventions. It accompanied a standard text format proposal which included much more detail.



The graphic adds two very important things to the text proposal. First, it gives readers a quickly comprehensible overview of what this is all about - a sort of visual ‘executive summary’. Second, in addition to the proposed interventions shown in the ‘ACTIVITY STREAM’, it adds a ‘SHARED INFORMATION STREAM’ (along the top of the graphic) designed to identify the organizational learning that should be occurring as the process unfolds. Too often we get caught up planning, implementing, and checking off the specific activities of organizational interventions, without having an explicit method for identifying, collecting, sharing and interpreting what we are learning during these activities. Useful information and new insights remain in isolated pockets of the organization. The graphic can be a starting place for making real, widely-shared organizational learning a priority.



## 9. Conclusion

Graphics can be used profitably to make distinctions, analyze relationships, present models, agendas, plans - all of which can help groups do their work more effectively. Graphic structures and techniques can also be used to gather input and record what happens during meetings - creating a visual/textual record. But I think the most comprehensive way to think about graphics in group process is in terms of changing the level and quality of interaction and participation.

When we reach the interactive level, we are inviting the group to have some input into the structure itself - what categories are important, and how shall we map them in relation to one another? Knowledge Management is one emerging area where such interactive development of categories is essential to producing a useful and user-friendly product.



The degree to which we invite the group to participate in creating the structure itself will vary with the boundaries of decision-making authority, the number of participants, their expertise, the time available, etc. But there is no question that at all levels of society, and across the spectrum of workplace and community tasks, we need to be expanding the possibilities for, and perfecting the technologies of, participation. The use of our fundamental human capacity to visualize will play a central role in this evolution.

### **Biography of Author:**

Mark Seidler is a trainer, facilitator, and organization development consultant with 16 years experience in the United States, Europe, and Asia. In a previous career, Mark was a science illustrator with the National Geographic Society in Washington, DC. He brings his graphic background to the task of designing innovative methods that allow working groups in any environment to be both more creative and more efficient. His facilitation skills have been used to help teams design software interfaces, conduct strategic planning, assess organizational needs, design and deliver training programs, and develop community action plans.

In addition to providing facilitation services, Mark has developed a graphic facilitation workshop to train managers and facilitators in the concepts and application of visual thinking to group and team work in public and corporate environments.

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