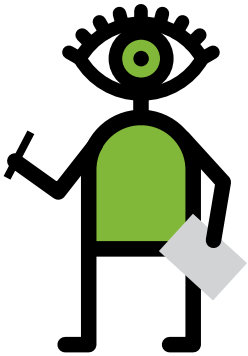
THE PROBLEM WITH MEETINGS



A practical guide to improving meetings with visual thinking

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The Problem with Meetings

A practical guide to improving meetings with visual thinking

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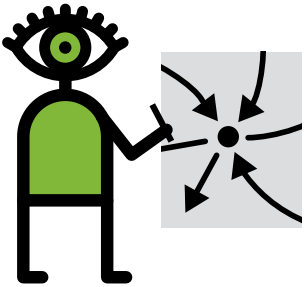


For most of us, meetings are part of our everyday work lives.

Companies of all sizes and industries have a variety of meetings, for all kinds of reasons.

When a meeting is good, it's really good.
The meeting leaves participants feeling energized and inspired. It unites teams around a common goal. Often, the session helps participants achieve greater productivity in an hour (or day, or week) than participants would've achieved on their own.

And when a meeting is bad, it's really bad.
The meeting leaves participants feeling drained, bored, and wondering what they were just subjected to. It creates confusion, frustration, and division. And, unfortunately, it often brings productivity to a grinding halt.

And it's not a small problem…

Organizations hold more than **3 billion** meetings each year.

Executives spend **40–50%** of their working hours, or 23 hours per week, in meetings.

73% of workers acknowledge they do other work during meetings.

25% of meetings are spent discussing off-topic issues.

 Source: Bernstein, Maya and Ringel, Rae. May 31, 2018. "Plan a Better Meeting with Design Thinking." *Harvard Business Review*.

90%
of attendees admit to day-dreaming during their meetings.

There are generally two kinds of meetings: status meetings and discovery meetings.

Status meetings are about reporting and measuring. For example: getting together to discuss progress and any roadblocks to success. Daily stand-ups that keep teams focused and connected fall into this category. So do quarterly staff meetings that build corporate alignment. Although they may vary in scale, status meetings are always focused on information sharing and report-outs.

Discovery meetings are about exploring and deciding. For example: defining a problem, ideating solutions, charting a path forward, or garnering leadership approval. These are the off-sites, work sessions, and war-room gatherings that bring groups together to tackle problems that are complex, require many participants, or have high stakes.

What is visual thinking?

Visual thinking is the process of taking information—which is inherently intangible—and making it tangible (read: visible) in order to enable better conversations and decisions. Visual thinking uses images to help us improve our own understanding, work out new ideas, and facilitate dialogue and collaboration.

Over 30% of the human brain is devoted to visual processing. That's a huge percentage. Touch uses only 8% of our brainpower, and hearing uses just 3%. No wonder so many people describe themselves as visual learners.

Many of us think in pictures, whether we realize it or not. Our brains try to make sense of the world by translating written or spoken language into images. But that translation step can lead to misunderstandings and confusion.

Visual thinking eliminates the translation piece of the puzzle and lets people communicate ideas in a clear way.

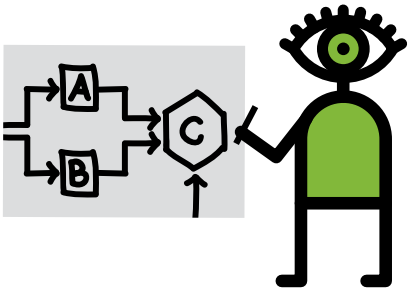
Why visual thinking works for meetings.

Visual thinking makes meetings better in several ways:

It keeps relevant and **useful information top-of-mind** for participants, sparking ideas.

It ensures that **all ideas are considered** before they are evaluated.

It creates a **record of the discussions** that take place and the decisions that are made.



Visual thinking makes meetings more collaborative. It gives everyone the time and space to share ideas—and to respectfully challenge assumptions. It gives participants an active role so they stay focused and on-task. Conversations are more efficient and productive, because misunderstandings are limited and ideas are made real. And because the brain's spatial memory system is involved, retention is improved.

As a result, the ideas and solutions that come out of visual thinking are more innovative, less biased, more clearly defined, and more focused on user needs. Your team is empowered to make better decisions more quickly—and to take action to accomplish your goals.

Visual thinking can be used:

Before a meeting to plan and prepare for success.

During a meeting to capture and develop ideas.

After a meeting to document and share outputs.

Visual thinking before a meeting

Decide and document what you want to accomplish.

Design the flow of the meeting.

Create props that support your agenda and goals.

Before a meeting, use the visual thinking tools on the following pages to help you focus your session and create effective materials that support your agenda.

One of the most important pre-meeting activities is setting the agenda. Think of an agenda as a process: each activity, exercise, or discussion should go in a specific order where each has inputs and outputs that build. Help attendees understand how activities and topics relate and how the broader problem will be solved.

Tool 1: Goal Statement

What is it?

A goal statement clearly expresses the intent of the meeting and what you are trying to accomplish.

Goal statements are succinct and specific. For example: "Review identified marketing tactics for next year and select the six most viable."

You can also set "not goals" for the meeting. These statements define what's out of scope or off the table. For example: "Today, we won't introduce new marketing tactics that weren't defined in our previous sessions."

Posting your goal statements where everyone can see them throughout the duration of your meeting helps participants focus on the task at hand.

How does it help?

As a meeting organizer, the act of crafting a goal statement helps you hone in on what you want to accomplish. It clarifies your purpose.

Displaying goal statements in the room shows that you have a shared objective. They serve as guideposts that anyone can point to when discussions seem to be veering off course.

How can I apply it?

Create one to three goal statements for a session. Be brief, specific, and realistic.

Display your goals on a poster, a whiteboard, or a presentation slide that you will leave up for the duration of the meeting.

Key steps and tips

- To define a goal statement, ask yourself, "What do we really want to accomplish?" Focus on what's possible given the amount of time you have for the session and the people who will be there.
- Phrase goal statements in clear, precise language. Include how the group will accomplish the goal or what success looks like. Bonus points if you include relevant metrics.
- Create a "not goal" to remind yourself and everyone else what's out of bounds.
- Post the goals where everyone can read them and review them as a group to ensure understanding. Refer back to them as needed to keep discussions and exercises on track.

Tool 2: Process Agenda

What is it?

A process agenda provides a visual overview of the meeting's topics and activities, along with additional contextual information.

A process agenda is more than a timeline of planned activities. It illustrates the flow of information and required decisions throughout the meeting.

Creating and following a process agenda ensures that all participants know what to expect from the session. It outlines what you need to accomplish in each activity to move your effort forward.

How does it help?

When meeting attendees understand what you are trying to accomplish in your session, they can make more meaningful contributions.

Showing how outputs of one discussion or activity act as inputs to another creates a sense of cohesion and flow throughout the session, whether it's one hour or several days long.

How can I apply it?

Use process agendas to design and plan productive meetings.

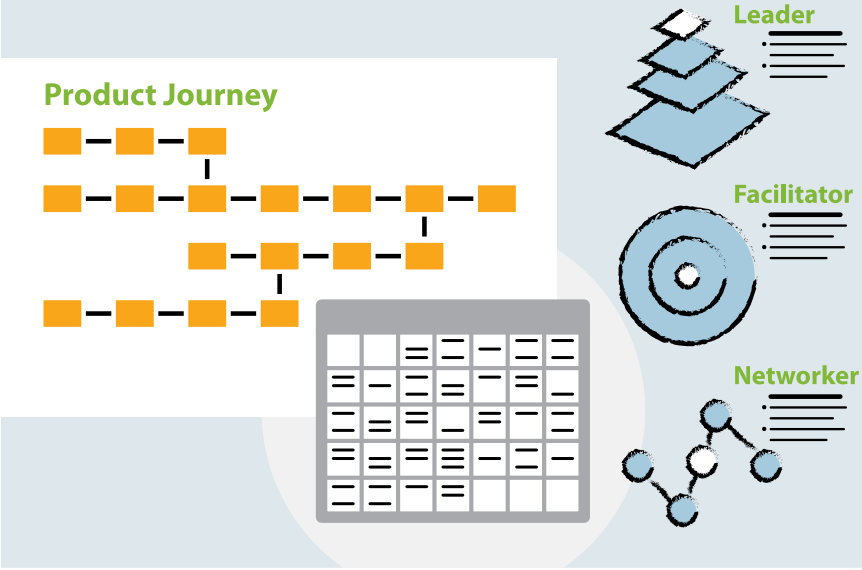
Start with your goal statements and work backward to determine what inputs, activities, and outputs are needed to arrive at each goal.

Display the process agenda somewhere easily visible so you can reference it as needed.

Key steps and tips

- Think about your goal statements. Ask yourself, "What will it take to achieve these goals?"
- Design your agenda around the inputs or information you need to collect; the actions you need to complete; and the outputs you need to produce in the end. Include start and end times, where possible.
- Use icons, simple sketches (stick figures are fine!), and text to develop a physical agenda that clearly outlines each activity along with its inputs, actions, and outputs. You can print your agenda on a poster, create participant handouts, or write it out on a whiteboard.
- Post the agenda for all to see and revisit it if your discussions or exercises seem to be getting off track.

Tool 3: Information Displays



What is it?

Information displays are visual tools for sharing data, knowledge, and other materials that will come in handy during the session.

You can create all sorts of information displays depending on your project and goal statements. Things like diagrams of teams, organizational structures, product lines, results of a pre-session survey, process maps, infographics, and visualizations of key metrics are just a few examples.

Information displays support participants in discussions and exercises by putting the reference materials they need out in the open.

How does it help?

When participants walk into the room and see the information displays, they are able to get in the right mindset and focus on the objectives.

Printing and pinning up reference information also helps save time during your session—no need to interrupt the flow to hunt down a presentation or spreadsheet.

How can I apply it?

Use information displays when you know you will need to reference specific materials in order to accomplish your goals. You don't have to be a graphic designer to create meaningful information displays. They can be as simple as written metrics on cards, printed marketing and sales collateral, or a sketch of the supply chain on the whiteboard.

Key steps and tips

- Review your goal statements and process agenda. Consider what information will be needed as inputs or as points of reference.
- However you decide to create your information display, make sure it's big enough for participants to read. You can send files to an office supply store print counter so they can be produced as large posters, if needed.
- Rotate or change your information displays as you go if you're short on wall space.

Tool 4: Permission Meter

What is it?

A permission meter is a visual indicator of the bounds of possibility for the meeting. It expresses the type of thinking you want participants to engage in during your session.

A low permission meter tells attendees to stick close to solutions and ideas that are low-risk, familiar, and easy to implement. A high permission meter gives them license to explore high-risk/ high-reward propositions, out-of-the-box ideas, and unconventional solutions.

Setting the permission meter helps participants put on the right thinking cap at the right time.

How does it help?

Setting the permission meter defines a meeting's tone and expectations. Similar to goals and "not goals," the permission meter puts a fence around the type of thinking you want.

Having these clear expectations helps to minimize confusion and frustration for the host and attendees alike.

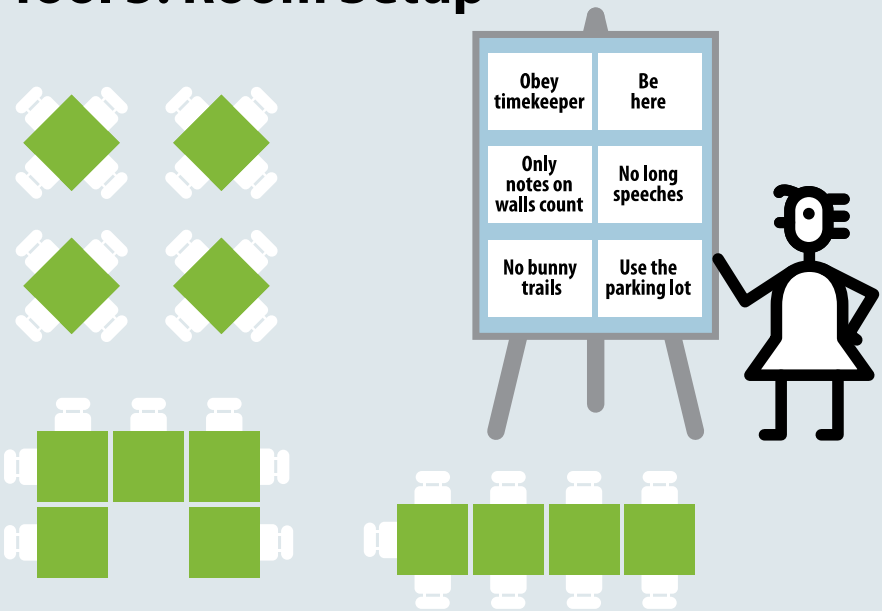
How can I apply it?

Use a permission meter to help participants adopt the right mindset for your session. A whiteboard sketch works just as well as a pre-drawn and printed meter. Set the permission meter before the meeting and review it with participants, or start the meeting by setting it as a group.

Key steps and tips

- Draw a permission meter on a whiteboard, or print out and hang up a pre-drawn meter. Make it big and clear.
- Set the level of the permission meter before or during the meeting, depending on how much input you want participants to provide.
- Bring the group's attention back to the meter any time you notice them moving away from the level of thinking you set.

Tool 5: Room Setup



What is it?

People do their best work in spaces where they feel comfortable. The way you set up your meeting room can have a big impact on its success.

For example, are participants engaged, or are they doing other work on their laptops? Can everyone see the information display? Are seats arranged to support discussion? Be intentional about the setup.

Depending on your meeting venue, you may have more or less control over the room configuration. Do what you can to make it work for you rather than against you.

How does it help?

The right meeting space and setup creates a collaborative, open atmosphere that makes participants feel comfortable contributing. By ensuring that the meeting room is conducive to good work, you limit distractions and empower attendees to focus on working together to achieve the goal (rather than on that weird buzzing sound).

How can I apply it?

Pick a meeting space with plenty of room for participants to sit and move around comfortably. Arrange it to suit your agenda—for example: to accommodate small group breakouts.

Don't be afraid to assign seats. Separating chatty coworkers or seating the boss off to the side can be a good idea.

Key steps and tips

- Arrange seating to manage interpersonal dynamics. Should everyone be at one table, or divided into small groups? Who goes where?
- Make sure there is room to move around and that everyone can see information displays.
- Create a "parking lot" poster to capture ideas and questions that are relevant to your goal but need to be addressed outside of the meeting.
- Establish meeting rules and post them in the room. Here are a few good ones:
  - Be here.
  - Only notes on the walls count.
  - No long speeches.
  - Beware of bunny trails.
  - Obey the timekeeper.
  - Use the parking lot.

Visual thinking during a meeting

Explore, define, and evaluate ideas.

Design activities for the kind of thinking you want.

Embrace and leverage group dynamics.

During the meeting, you're going to use the plan you created before the meeting.

Keep in mind that there are stages of ideation: explore, define, and evaluate. *In the following chapter, tools are organized by these stages for quick and easy reference.* You might use all three stages in one meeting, or you might have to split them up. Decide which stages you want to explore during the goal setting process, and be clear about it with participants.

It's important to design your session activities for the kind of thinking or ideas you want. This chapter includes a variety of exercises that can help you achieve the goals you defined before the meeting.

During the meeting, think about how you will use group dynamics to achieve your goals. For example: introverts and those who need time to process appreciate some quiet time to sit and write their thoughts out. Small teams can help tackle multiple ideas and facets at once and then present to the larger group. Large groups can evaluate and sort through information and ideas quickly.

Exploring
Tool 6: Personas

What is it?

Personas are audience profiles that help you understand what certain audience segments think, feel, and do in relation to the problem you're trying to solve.

A persona represents the needs, interests, and characteristics of a segment as one specific person or role. For example: a persona can be created for a specific type of user, project stakeholder, influencer, or employee.

Creating and using personas is especially valuable for practicing empathy as you work through the activities of your meeting.

How does it help?

Developing personas helps you to build an understanding of the people who you are trying to serve, market to, communicate with, etc.

Once your personas are established, you can refer back to them and use your empathy for them to drive decisions. Referring to them by a real name makes them easier to remember.

How can I apply it?

Use personas to keep your audience's wants and needs front and center. Tools like surveys, interviews, and research provide the insight you need to define accurate personas.

Create your personas in advance and include them in an information display, or develop them during the meeting. Make them as simple or complex as needed.

Key steps and tips

- Determine which audiences are most relevant to your session's goal. What information do you need to have about them?
- Collect data to gain the insight you need. Even a handful of informal interviews can lead to valuable observations.
- Use what you've learned to create personas' narratives, including a name for the imagined group, as well as a description of their role, priorities, and needs. Build the persona ahead of time, or create a persona template to fill out as a group.
- At the beginning of the meeting, review your personas with participants and discuss them. Are there any changes that should be made?

Exploring
Tool 7: Cards

What is it?

Cards are a fundamental tool for visual thinking in meetings.

The premise is simple: legibly write all ideas, questions, problems, solutions, etc., in short phrases on cards. You can have teams use different colors of markers or cards if it's important to know who wrote what, or everyone can use the same color if that doesn't matter. Then pin or tape them up on the wall where everyone can see them.

Once cards are written, they can be used in many different exercises and methods, from voting and sorting to mapping and scoring.

How does it help?

Documenting all ideas on cards has many benefits. The act of writing forces participants to think about what they mean in a way that they might not if they're just talking.

It also helps to keep ideas separate and allows everyone to contribute—even those who may need some time to formulate their thoughts or may not feel comfortable speaking up.

How can I apply it?

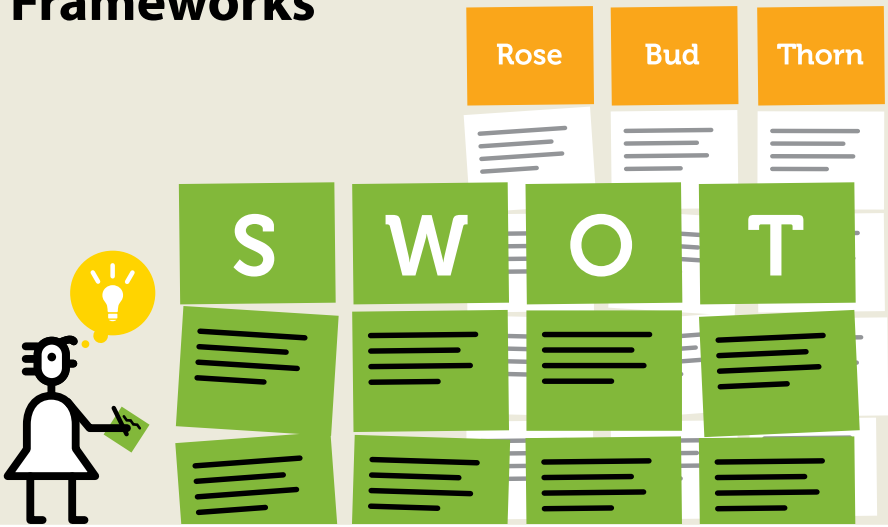
Use cards with a clear end goal in mind. A wall of sticky notes that no one ever reads is useless.

Ask targeted questions and give participants a set amount of time to write down their thoughts. Enforce the "one idea per card" rule and make sure everyone writes neatly. Leave plenty of time to review and sort the cards.

Key steps and tips

- Gather the right supplies: cards or sticky notes in different sizes and colors; fresh markers; and a place to pin or tape them all up.
- Remind participants to write neatly and use clear, succinct language. Stick to one idea per card and provide enough detail and context that the card will still make sense next week.
- If possible, assign a non-participant to be the scribe and write down the ideas that come up while the group is talking.
- When idea generation is done and it is time to share, ask everyone to read their cards out loud and add brief commentary. Then pin or tape them up.
- It's okay to rewrite cards to clarify the ideas.

Exploring
Tool 8: Problem Exploration Frameworks



What is it?

Problem exploration frameworks provide guidance and boundaries that help focus participants' thinking without limiting it.

Here are a few to consider:

- Jerry McNellis' Compression Planning technique uses a templated arrangement of cards to define a problem, explore solutions, and develop an action plan.
- The Rose, Bud, Thorn activity asks teams to consider aspects of a situation that are great (roses), have potential to be great (buds), or are problematic (thorns), revealing key themes for the group to explore.
- SWOT Analysis examines the organization's internal strengths and weaknesses, as well as its external opportunities and threats.

How does it help?

Using problem exploration frameworks helps participants jump-start their thinking through prompts that get them to focus.

The added structure of the framework makes it easier to come up with on-topic ideas and drive productive discussions.

How can I apply it?

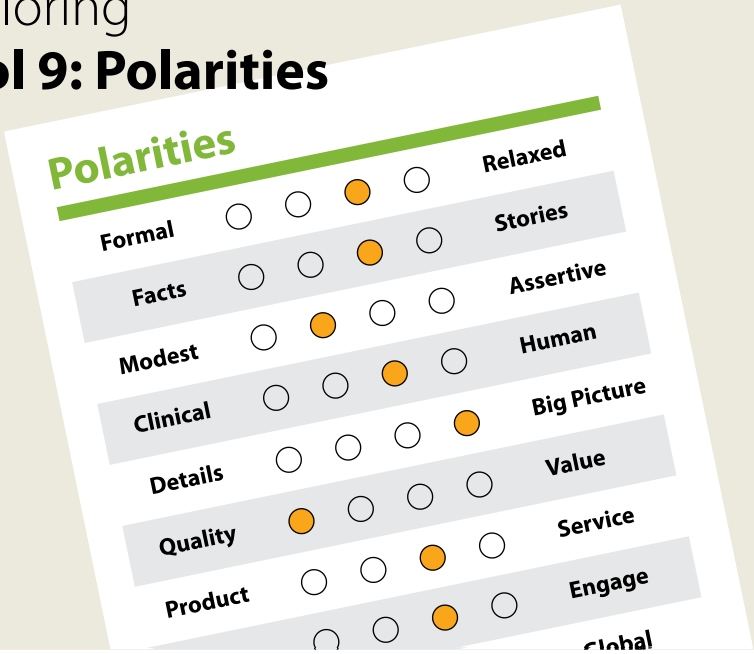
Use problem exploration frameworks when you need to point participants in the right direction for brainstorming.

Try one of the frameworks described here, or create one to suit your meeting's goal. Most frameworks involve giving a structured prompt, writing ideas on cards or sticky notes, and grouping or sorting them to uncover patterns.

Key steps and tips

- Think about your goal statements and process agenda. What guidance will participants need to come up with the right inputs and outputs?
- Select an existing problem exploration framework, or create your own.
- Provide plenty of cards or sticky notes in different colors and fresh markers for participants to use to document their ideas.
- Give your prompt and set the timer. Pin all cards on the wall according to your framework.
- Follow with an exercise for sorting, voting, or scoring, as well as a group discussion.

Exploring
Tool 9: Polarities



What is it?

Polarities are a series of opposing word pairs that help you explore and define the characteristics of a process, experience, system, or brand. They can focus on current state or future state.

Participants are asked to choose where something falls on the spectrum of each word pair by placing a sticker. There is no middle option, so they have to pick one side or the other.

When examined together, the completed polarities offer a powerful representation of the topic at hand.

How does it help?

Well-crafted polarities help you identify characteristics that you may not otherwise consider.

The most valuable part of the exercise is often the discussion it provokes. Because participants must choose a spot across the spectrum, differences of opinion are visually highlighted.

How can I apply it?

Use polarities when you want to foster open discussion about how something is today or how it should be in the future.

Choose your word pairs carefully. Each pair should be distinct and cover separate ends of the spectrum. Participants will ask, "What do you mean by that?" Make sure each word's meaning is clear to the team.

Key steps and tips

- Define six to twenty opposing word pairs.
- Print the word pairs on a poster or write them on a whiteboard with space in between. Draw four open circles between each word pair. Why four? If you have a middle option, people will choose it. Force participants to pick a side!
- There are different options for facilitating this exercise. Each participant can complete their own chart, and then the group can compare. Or, each participant can use a different colored sticker on one poster. Alternatively, the group can complete the poster together, calling out where they think the sticker should go.
- Leave time for discussion and comparison. The conversation about sticker placement is the most useful part of a polarities exercise.

Exploring
Tool 10: Collaging

What is it?

Collaging involves combining pre-made images and words into a "mood board" that represents participants' ideas.

Collages can be physical or digital. They can include images cut from magazines, icons made for the session, stock photos, illustrations, typefaces, textures, patterns, colors, and more.

Creating a collage can help participants express ideas that may be difficult to explain in words.

How does it help?

Collaging helps attendees who may not feel comfortable whiteboarding or drawing still harness the power of visual thinking.

The finished collages make ideas tangible and reveal relationships. Comparing similarities and differences between collages supports productive discussions.

How can I apply it?

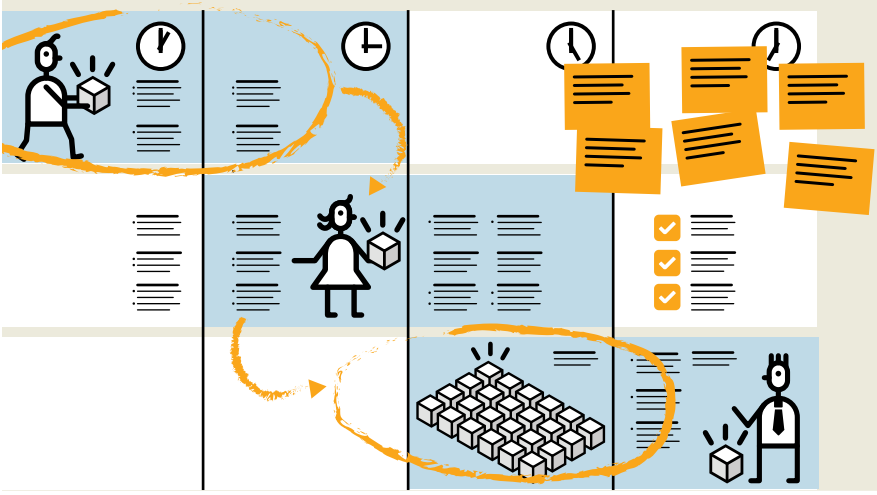
Use collaging to imagine the future of a process, identity, or relationship or to understand the root causes of a problem.

While some participants may initially feel silly doing an "art project," pushing through their insecurity will spark new ideas and connections.

Key steps and tips

- Gather source images, typefaces, colors, and other visual elements. If appropriate, allow attendees to bring their own images.
- Set a timer for 20 minutes. Have participants work individually or in pairs to create their collage. Encourage them to add phrases, small drawings, and lines to clarify meaning.
- Give each attendee or pair a few minutes to present their collage to the group and explain why they chose the images they chose. Discuss similarities and differences.

Defining
Tool 11: Diagramming



What is it?

Diagramming organizes events into a linear, visual sequence, usually on a whiteboard.

Both experiences and processes lend themselves to diagramming. An experience diagram illustrates the activities and interactions between people, while a process diagram illustrates flows of objects or data. Elements like actors, tools, actions, enablers, communications, thoughts, and feelings layer on additional meaning.

The completed diagram can help participants identify which aspects of the experience or process work well and where there are opportunities to make improvements.

How does it help?

Diagramming helps groups create or improve experiences and processes by making many different elements visible at once.

This tool is especially useful when inventing something new, because it can ensure that participants consider everything that will be needed to support and enable the end result.

How can I apply it?

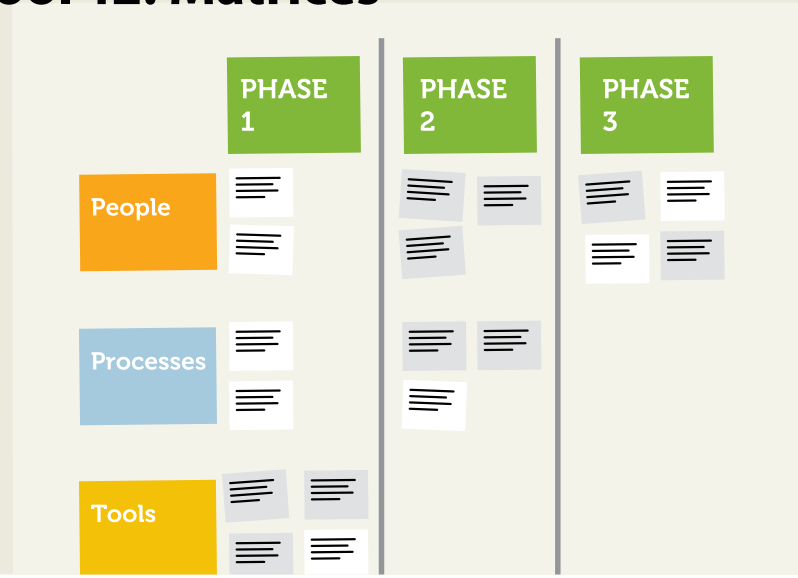
Use diagramming to better understand the key players, activities, and enablers of an activity or process so you can make better decisions.

Diagramming can be applied to almost anything, from supply chains to talent management to operations to sales. It helps teams gain the 30,000-foot perspective.

Key steps and tips

- Find a large whiteboard or sheet of paper to diagram the experience or process, and gather fresh markers in several colors.
- Establish a visual language. How will you use color and shapes to illustrate applications? What about people? What does a dotted line mean? There's no need to be an artist—stick figures and basic shapes are just fine.
- Draw big and label everything. Start with the building blocks: phases and key activities. Focus on showing people, and make them do work. Indicate what tool they are using and what the inputs and outputs are.
- Then reveal intangible and invisible things like thoughts and speech, as well as data, money, time, technology, and more.

Defining
Tool 12: Matrices



What is it?

A matrix is a rectangular arrangement of elements organized into rows and columns. For example: a grid of cards with categories defining columns across the top and rows for specific ideas down the left side.

Matrices put structure around content collection. Each piece of information you write down should belong somewhere in the matrix. This format pushes participants to focus on providing the details and information you need to collect.

They also make it easier to see which ideas are more complete and which ones have gaps that need to be filled.

How does it help?

Organizing information into matrices makes it easy to see what you have. The format helps participants structure their thinking, while still exploring solutions to fill gaps.

You can fill out a matrix row by row or column by column, depending on your priorities.

How can I apply it?

Use matrices when you need to build out the details of multiple ideas in a parallel way.

Cards work best for matrices, because you can use different colors for labels and content and rearrange information as needed. Alternatively, you can use a spreadsheet, a whiteboard, or a poster to build out a matrix.

Key steps and tips

- Decide which categories of information you want to collect—for example: "Description," "Platform," "Owner," etc. Write category names on cards and arrange them as column headings.
- Decide which ideas to build out using your column headings. Write the names of these ideas and arrange them as row headings.
- Talk through the details of each idea, working your way through the columns and rows. Take clear, legible notes on cards and pin or tape them in place along the matrix.

Defining
Tool 13: Worksheets and Canvases

What is it?

Worksheets and canvases are structured documents used to collect specific information in a consistent way.

They can take many different formats and include many different types of questions and prompts. For example, you can create a Mad Libs™-style worksheet and ask participants to fill in the blanks. You can also use something like Strategyzer's Business Model Canvas to design and document business models in a visual format.

The physical structure and content fields you include guide participants in their thinking, which encourages them to provide the information you need.

How does it help?

Using worksheets and canvases helps participants provide content at the right level of detail and lets you capture multiple types of thinking in one place. The structured formats produce consistency in content collection, which makes it easier to compare ideas and scan them for similarities and differences.

How can I apply it?

Use worksheets and canvases when you need to collect information in a consistent format.

Design your worksheet or canvas to suit your group and session goal. You can include multiple types of questions and visual thinking tools, from multiple-choice questions and sentence builders to polarities and scoring.

Key steps and tips

- Determine the information you want to collect on the worksheet or canvas.
- Design the worksheet or canvas, or choose a pre-existing one. Leave enough room for participants to document their content on sticky notes or on the worksheet or canvas itself. Add labels and instructions so that participants know how to document their ideas. Examples help, too.
- In the session, explain the worksheet or canvas and the level of detail you are looking for.
- Ask participants to complete the worksheet or canvas individually or in small groups.
- Cross-share the worksheets or canvases and discuss similarities and differences.

Evaluating
Tool 14: Clustering

What is it?

Clustering is a tool for identifying the common themes between ideas. You look at all of the content that was generated and search for related concepts.

Clustering can be tailored to your session goals and participants. You can begin organizing while participants are writing, or your can wait until all pens are down.

Once your ideas are organized into clusters, you can more easily evaluate them and do additional exercises based on what the clusters reveal.

How does it help?

Clustering reveals patterns and relationships. You can learn something from the number of clusters, the number of cards in each cluster, the cluster categories, etc.

Clustering is a great lead-in to discussions and visual thinking methods. You can prioritize clusters, score the cards within clusters, or map clusters by dependency.

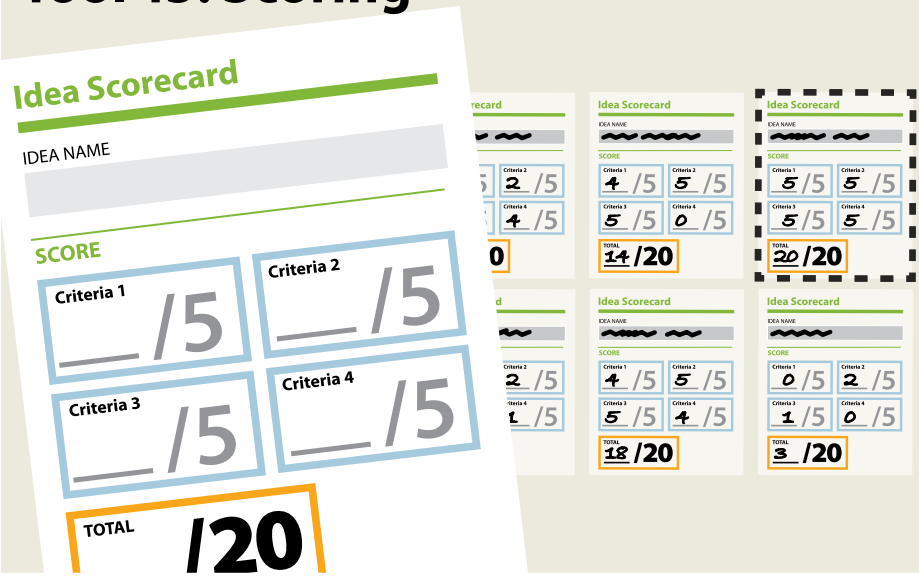
How can I apply it?

Use clustering when you have a lot of content to sort through. Read through all of the ideas and group them based on the common themes that you notice. This can be done by the facilitator or by participants, while ideas are still being generated or after all ideas are out there. Always leave time for discussion afterwards.

Key steps and tips

- Give participants a brainstorming prompt and pass out cards or sticky notes and markers. Remind them to write one idea per card, and give them a set amount of time.
- Collect cards from participants as they write them, or wait until everyone is finished and do a quick round of cross-sharing first.
- Read the cards and move them into thematic clusters of related ideas. Try different groupings until you find what works. Pay attention to how many cards are in each cluster, and break them into sub-clusters if needed.
- Review the clusters and discuss what they reveal. For example, do the cluster sizes tell you anything? What about the cluster themes? Use the discussion to drive additional exercises.

Evaluating
Tool 15: Scoring



What is it?

Scoring is a method for comparing and prioritizing ideas and quantifying the similarities and differences between them.

Participants apply the same set of criteria to each idea. For example: assigning a score from one to three in the categories of "Market opportunity," "Difficulty," and "Urgency." Using numbers makes the reasoning behind each overall score visible, eliminating confusion about what the group *feels* is most important.

When scoring is complete, you can clearly see which ideas received the highest and lowest scores and how those scores break down.

How does it help?

Scoring removes emotion from decision making by evaluating all ideas against the same criteria. It quantifies comparisons, which helps to keep politics and personal agendas in check.

Because participants are engaged in the evaluation process and can see why certain ideas rose to the top, they can support the outcome.

How can I apply it?

Use scoring to compare ideas so you can make decisions about them. Each idea receives a numeric score based on how it fits the set criteria. The overall score and the breakdowns foster discussion and objective prioritization.

Ask individuals or teams to score the ideas, then discuss which ideas came out on top, and why.

Key steps and tips

- Create a scoring worksheet that will be used to assess ideas. The worksheet should include the evaluation criteria and a way for participants to record scores. There should also be a place to total the scores.
- Complete an exercise to generate ideas.
- Have participants use the scoring worksheet to evaluate each idea. They can work individually or in groups.
- Once all ideas have been scored, discuss the exercise. For example: which ideas rose to the top? Were there any ties? Are you surprised by the results? Use the discussion and scores to feed additional exercises.

Evaluating
Tool 16: Voting

What is it?

Voting is a tool for getting a group's gut reaction to how ideas should be prioritized. It is less transparent than scoring because the reasoning behind the votes is not documented.

Everyone is given the same number of votes to cast or "points" to spend across the ideas. Participants can use indicators like colored dot stickers to mark their votes, or they can write down the number of points they want to spend on each idea.

At the end of the exercise, you can easily see which ideas received the most votes or points.

How does it help?

Voting is a quick, independent exercise that shows how ideas compare based on gut reactions. It aids in prioritization by making it clear which ideas rise to the top.

Voting gives all participants an equal voice in decision making, creating a stronger sense of commitment to the outcome.

How can I apply it?

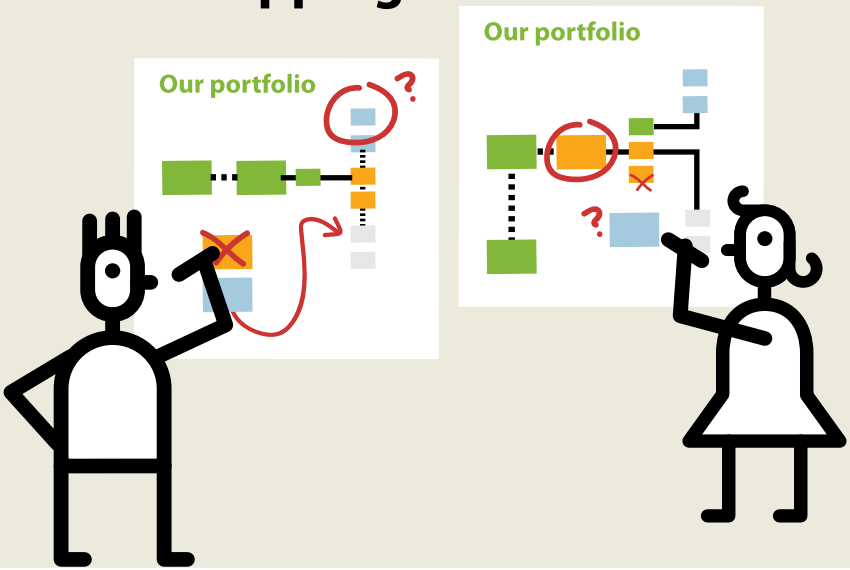
Use voting when you need to quickly set priorities. Ask participants to vote from a certain perspective. For example: prioritizing the three ideas they want to tackle this year.

Dot stickers are great for voting. Use the same color for everyone or different colors for different teams. Another option is to give participants 100 points to "spend" on ideas.

Key steps and tips

- Complete an exercise to generate ideas.
- Based on the number of participants and the number of ideas, give each participant a set number of votes or points. Use something physical to represent votes, such as stickers.
- Give participants a set amount of time to review the ideas and vote for their top choices. If using dots, participants can vote for each idea only once. If using points, they can allocate their points however they choose.
- Once all votes have been cast, discuss the results. Which ideas got the most votes or points? Are there any ties? Is anything surprising? Use the discussion and votes to feed additional exercises.

Evaluating
Tool 17: Mapping



What is it?

Mapping is a tool for visualizing the relationships between things or ideas. It allows you to illustrate connections that may not be obvious and could lead to confusion.

Mapping uses visual cues like distance, boundaries, colors, and different types of lines and arrows to show connections, barriers, dependencies, flows, and more. You can think of mapping as a type of diagramming that doesn't *require* the topic of exploration to be a process or experience. Ideas like product portfolios, supply chains, and organizational charts are great for mapping—though processes and experiences can benefit from mapping too.

Once mapped relationships are visualized and out in the open, the group can more easily compare and discuss options based on characteristics and implications.

How does it help?

Mapping helps prevent or resolve confusion and misunderstandings by using visuals to clarify complex ideas and discussions.

It also supports prioritization and action planning by getting big ideas and small details out of participants' heads and onto the board so they can be addressed.

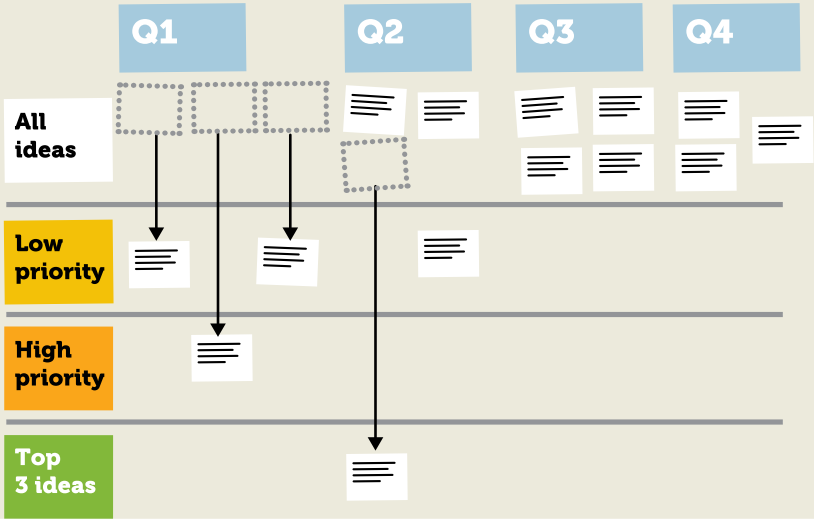
How can I apply it?

Use mapping when you need to see how things connect. For example: understanding how processes, dependencies, or organizational structures relate. After content is defined, a mapping exercise can help you prioritize options or explore ideas. And don't let a lack of artistic skill stop you! If you can draw lines, you can do mapping.

Key steps and tips

- Complete an exercise to generate ideas on a whiteboard or poster.
- As a large group or in smaller groups, visually illustrate the relationships between ideas. Use different colored markers, arrows, and line patterns to indicate different types of connections—for example, a solid red line is a roadblock, and a dashed blue line is a dependency.
- Cross-share the maps if needed, then discuss the exercise. Does everyone agree that the map is accurate? Where is there confusion or disagreement? Use the discussion and map to feed additional exercises like action planning.

Evaluating
Tool 18: Sorting



What is it?

Sorting is a tool for organizing ideas written on cards into a clear hierarchy. It helps you get from "many" to "few" and allows you to make decisions and take action. If clustering is about putting like ideas together, sorting is about putting a category of like ideas into a hierarchy.

The way you sort can vary depending on what you're trying to accomplish, the amount of time you have, and the number of ideas and people you have to work with. You can do one round of sorting or multiple rounds to peel back the layers of difference and narrow your options. Tailor your approach to the session.

After sorting is complete, participants should have a clear idea of what all of the options are and which ones to pursue further.

How does it help?

Sorting turns a jumbled collection of ideas into an ordered, prioritized list. This organization eliminates guesswork and confusion about what the group should focus on.

It smoothly leads in to planning activities like identifying next steps, assigning owners, and building timelines.

How can I apply it?

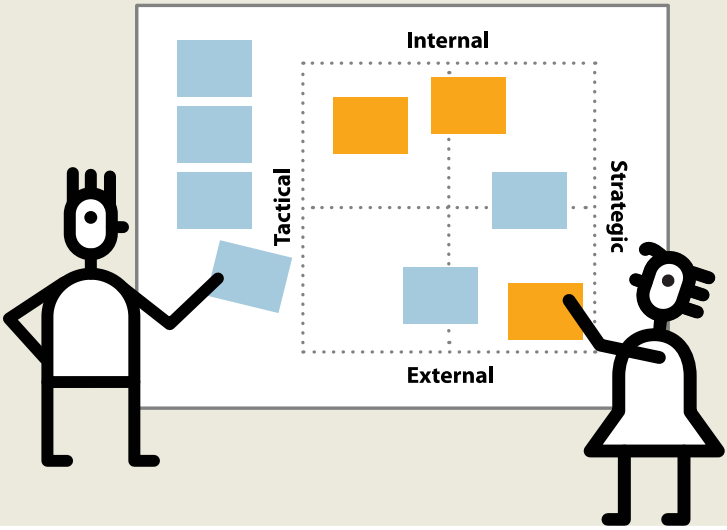
Use sorting when you have a lot of content and don't know what to do with it. Sorting creates the structure teams need to figure out what to do next.

Sort however makes the most sense for your group. It can be as simple or as complex as you need it to be to rein in the chaos. Complete multiple rounds from different perspectives.

Key steps and tips

- Complete an exercise to generate ideas on cards.
- Decide how to approach sorting. Participants can work individually or in small groups. They can sort all cards or a subset of cards. And they can do one round or multiple rounds of sorting.
- Give participants a set amount of time to sort their cards. They should physically move the cards around on the table or board.
- Follow sorting with a discussion and planning activities to help the group determine next steps, if appropriate.

Evaluating
Tool 19: Four-square Charts



What is it?

Four-square charts (sometimes called Boston Boxes) use vertical and horizontal spectrums to organize ideas based on their characteristics.

It involves physically plotting ideas on a grid of four squares, defined by two sets of independent polarities. For example: low cost vs. high cost and low impact vs. high impact. Information architecture indicators like position, color, size, quantity, and proximity can also be used to define criteria.

A completed four-square chart provides a visual representation of the characteristics and perceptions of ideas that might otherwise be hidden.

How does it help?

Four-square charts help you distinguish between options by visualizing how they compare based on multiple criteria.

They support different types of evaluation, such as prioritizing projects, guiding branding efforts, planning communications, or visualizing existing and future offerings.

How can I apply it?

Use four-square charts to compare ideas on multiple criteria at the same time.

At a minimum, you need two independent polarities to define the vertical and horizontal axes. Choose additional indicators as needed. You can come to the meeting with a pre-built four-square chart and ask participants to react to it, or you can fill it out during the session.

Key steps and tips

- Create a four-square chart by drawing a pair of intersecting vertical and horizontal lines.
- Label the axes with two independent polarities. Make sure they are distinct. It should be easy to place each idea you evaluate into a box. If it's difficult, the polarities are wrong.
- Define additional criteria to use, if you like. Use indicators like color, size, and quantity to mean different things.
- Physically place idea cards on the four-square chart based on the polarities and any additional criteria you're using.
- Once the chart is complete, discuss what the placement shows. For example: are there any gaps? Are all of the biggest, most complex ideas in one quadrant?

Visual thinking after a meeting

Begin with the end in mind.

Create easy documentation for sharing.

Focus on analysis and insights.

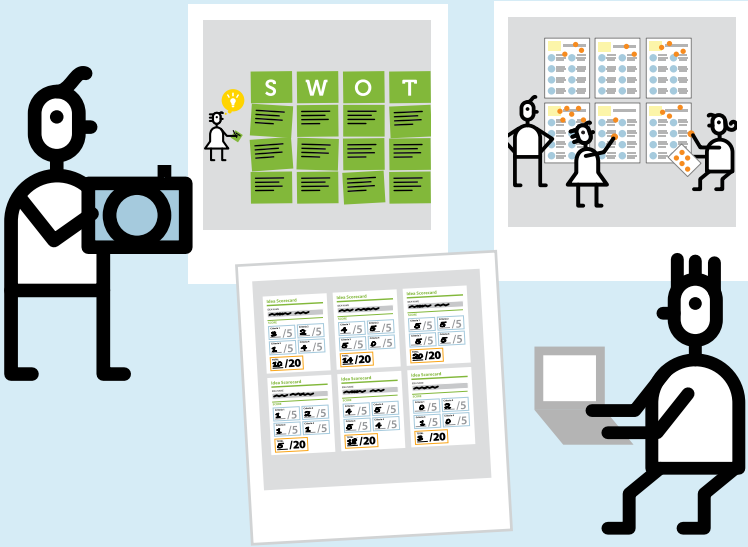
Visual thinking can also help with those pesky after-meeting tasks, like documenting action items and next steps, as well as catching up folks who weren't at the meeting.

One of the most valuable things you can do is to begin with the end in mind. You start that process all the way back when planning your agenda. What decisions do you have to make during the meeting? What assignments do you want to give out? Where are the ideas generated in this meeting going?

If you know that, you can shape your exercises to drive to those decisions and capture all the right information, without having to go back after and do a lot of rework.

One of the great advantages of visual thinking meetings is that much of the documentation is done for you. All of the charts, posters, and sketches have your ideas documented right on them. All you need to do is focus on providing commentary about analysis and key insights.

Tool 20: Documenting



What is it?

Without clear, accurate documentation, even the most productive session can result in inaction. As time passes, participants' recollections of discussions and decisions from the meeting can fade. Avoid that with clear session documentation.

Documenting your meeting can be as simple as taking photos of completed exercises before packing up for the day. You can also capture photos of participants in the midst of activities and add narrative summaries if you want to be more thorough.

An accurate record of the original meeting allows both attendees and outsiders to understand what you accomplished together and how you got there.

How does it help?

Documenting the exercises, discussions, and decisions made during a meeting helps you remember what happened over the course of the session.

Referring back to this visual record makes it easier for participants and stakeholders to share what was accomplished and to take action to move the effort forward.

How can I apply it?

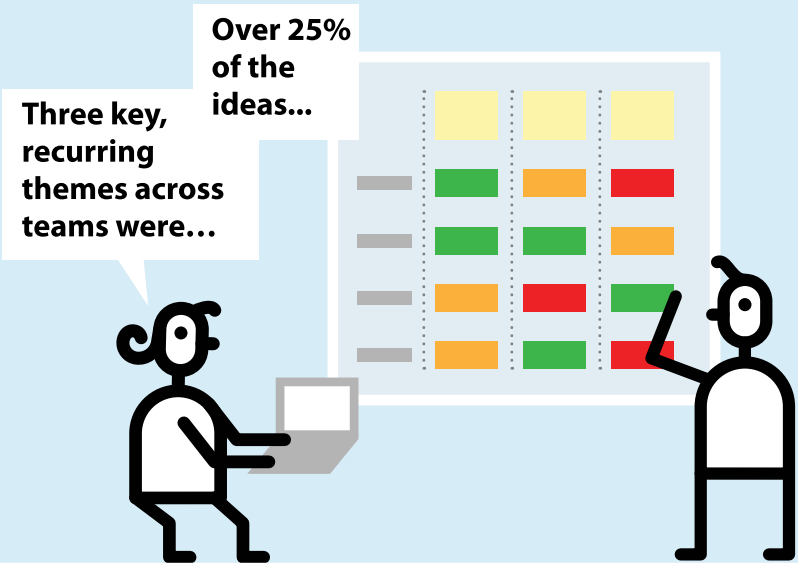
Use documentation to create a lasting record of your session and how you worked through your agenda to achieve your goals.

At a minimum, focus on capturing outputs. You can keep the physical artifacts of exercises, or just take clear photos. Type up cards so they're easy to read, if you like. Capture as much context as possible.

Key steps and tips

- Before the meeting starts, make a plan for documenting it. Are you going to capture photos of exercises as you go, or will you wait until the end of the session? Who will do this?
- If it's helpful, set reminders to take photos throughout the day. Document half-completed work as well as anything that might get erased or lost, like a whiteboard.
- Photograph each exercise in as much detail as possible. Pay attention to lighting, and make sure that text can be read.
- If possible, save artifacts like cards, worksheets, and posters. They'll help you in your analysis.
- Store all of your photos and any notes in one place—for example, an InDesign file, a Word document, or a PowerPoint presentation.

Tool 21: Analysis



What is it?

Analysis is a post-meeting activity where the facilitator or participants review documentation from the meeting and annotate it.

Annotations may describe what people were feeling, thinking, or learning during each activity. They can also include insights that came to mind after the meeting ended, as well as additional information or context.

Analysis is critical to uncovering the real value of the session, making sense of what was done and discussed, and turning ideas into actions.

How does it help?

Analyzing the meeting helps you bring everything together—the results of exercises, decisions that emerged from discussions, and next steps and action items still to tackle.

It reveals common threads, highlights gaps, and gives you a clear understanding of what you need to do to advance your effort.

How can I apply it?

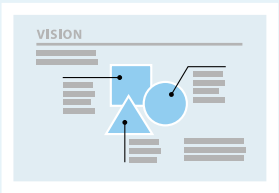
Use analysis to bring your documentation to life. Add annotations to connect the meeting exercises and discussions to your process agenda, photos, and other artifacts.

Focus on highlighting key takeaways from the session and adding color commentary. You're not creating a transcript. What are the big ideas that you want to ensure are understood?

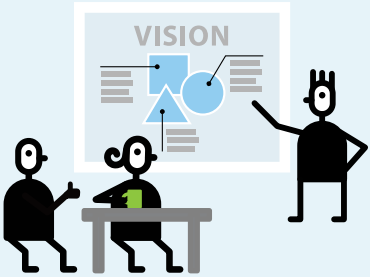
Key steps and tips

- Review your photos, posters, and exercise artifacts. Think through each discussion and activity and jot down notes about what happened.
- Look at the session through fresh eyes. Did any patterns or common themes emerge? When was there clear consensus, and when was there disagreement? Were certain people or teams especially vocal or quiet?
- Add annotations to capture these insights and key takeaways. When you refer back to this document in a week, a month, a year, what will be most important for you and the team to remember?

Tool 22: Distribution



VISUALIZATIONS



PRESENTATIONS

DOCUMENTS

What is it?

Be intentional about how you share your meeting documentation and analysis. Decide who should get what, and focus on what's most important for them to know.

You might email a PDF of your recap document to participants to use as they wish, or you may want more control over how it's shared. You can create and deliver a presentation to leadership, share printed one-page overviews with teams, or post key takeaways in public spaces. Do what makes sense for your effort and organization.

Sharing your meeting output with others helps them understand what you did and demonstrates your commitment to moving the effort forward.

How does it help?

Distributing your meeting documentation at any level helps others align and engage with your effort.

By sharing not just the end results but also the process you followed to get there, you create transparency and encourage continued discussion. Tearing down silos is a good thing.

How can I apply it?

Strategically distribute your documentation as evidence of the critical thinking that went into the decisions that were made in the session.

Transparency is a habit. Once you start opening up about the processes and outcomes of your meetings, it will seem like second nature. You may even find that others follow your lead.

Key steps and tips

- Think about who should receive the meeting documentation, and why. Do they need to take action? Do they need to give you the green light to move forward? Do they just need to know that you didn't waste four hours of the company's time and money?
- Based on your audiences, determine how to best communicate your meeting process and output. Consider the level of detail they need and how much time they can spend with the document. Create a distribution plan.
- Develop other communication pieces to support your rollout and share your messages in a way that will resonate with stakeholders.
- Provide direction in terms of who different pieces should be shared with, and how.

Getting started

This guide has shown you how visual thinking helps teams have productive meetings, efficiently build consensus, reveal actionable insights, and set the stage for everything that follows a great meeting. Visual thinking gets people out of their comfort zone by giving them a different way of working and thinking. It levels the playing field and creates a safe space for suggesting and questioning. It shines a light on the insights, information, and opinions that have been hiding in people's minds.

Remember, a visual thinking meeting is not the same as a presentation—or even an interactive presentation. While a presentation gives information to the audience, a visual thinking meeting helps the audience create and share information. Visual thinking does this through structured exercises and discussions, organized into a framework that enables collaboration and productivity.

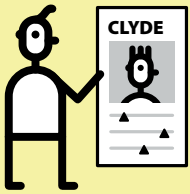
Now that you know how visual thinking works and how it can improve your meetings, let's talk about how you can get started using visual thinking—today!

Remember why it works

Visual thinking works because it's built on these four principles:

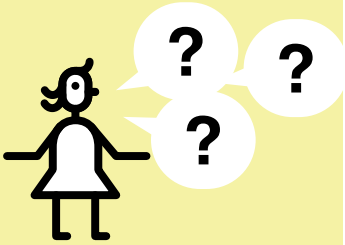
1

Focus on the user. When designing a meeting, ensure that the content and exercises you do are relevant to the group and, most importantly, the individuals you are trying to solve for. This "user focus" will keep everyone on track and focused on achieving the goals.



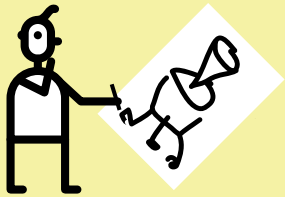
2

Challenge assumptions. While a lot of preparation and research goes into a well-facilitated session, you won't have all the answers on your own. Be willing to challenge your own assumptions and learn from the group.



3

Make it real. Abstract concepts are tough to grasp. By making meetings visual—doing things like sketching while talking or using physical posters, sticky notes, and dots—you can make ideas more concrete.



4

Encourage collaboration. The best ideas aren't developed in a vacuum. By responding to and building on others' comments, you'll give good ideas the opportunity to become great ideas. And you'll weed out the duds.

Getting started: an overview

To get started with visual thinking in your next meeting, follow these seven easy steps.

Step 1:
Set goals
Determine if a meeting is the right way to achieve your goals.

Step 2:
Plan the session
Select the who, what, when, and where.

Step 3:
Create an agenda and frame exercises
Design the meeting experience and set expectations.

Step 4:
Build a work plan
Create a plan to manage time and responsibilities.

Step 5:
Prepare to facilitate
Develop the tools and get the room ready for facilitation.

Step 6:
Facilitate the meeting
Conduct the session and accomplish your goals.

Step 7:
Document what you learned
Record what happened so you can use it.

A few thoughts about facilitators

In design-based facilitation, as in any type of facilitation, the facilitator's skill is a big influence on the success of the session.

A facilitator can act as a neutral third party (the role ThoughtForm typically plays when facilitating for clients) or as an engaged guide who's part of the team. A neutral facilitator doesn't contribute content to the discussion, while an engaged guide might. Depending on the type of workshop or meeting, the best style of facilitation may vary. It may be beneficial for the facilitator to have background knowledge in one case and to be more of a blank slate in another. But either way, it's the facilitator's job to listen, keep the group focused, remove obstacles, and encourage participation.

A great facilitator is:

Adaptive. While having a plan for a meeting is a must, the best facilitators know that things don't always stay on plan. An exercise might take more time than anticipated. The number of attendees may change at the last minute. Supplies and posters might arrive late. A great facilitator takes these bumps in stride and makes adjustments to get back on track.

Collaborative. Facilitating isn't about having the loudest voice in the room. It's about fostering an environment that invites collaboration and creativity. Remember: there's a difference between presenting and facilitating. A great facilitator is a team player, always looking for ways to remove obstacles and enable understanding.

Perceptive. Group dynamics vary widely. A meeting can have participants who are outspoken or reserved, happy to be there or annoyed, good buddies or total strangers. A great facilitator is able to pick up on the subtle (and not so subtle) cues in the room, resolve tension, and ensure that everyone's voice is heard.

Strategic. A great facilitator has a finger on the pulse of the meeting, understands what needs to be accomplished, and knows how to lead the team there. Strategic thinking before, during, and after the meeting is essential.

Who we are

ThoughtForm blends management insight with design-based methods to help organizations shape, communicate and launch complex initiatives faster and more effectively. It's been reported that 70% of all enterprise initiatives fail, with the primary cause of a lack of alignment and commitment among stakeholders. ThoughtForm's proprietary methods make initiatives tangible and give teams a reason to believe and a roadmap to follow. We support leadership teams from initial development through launch. ThoughtForm works with dozens of Fortune 100 companies, as well as innovative startups and nonprofits.

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