

VISUAL TEAMS



CREATE

SUSTAIN

I'M READY TO LOG IN,
ARE YOU THERE?

GRAPHIC TOOLS FOR
COMMITMENT,
INNOVATION, &
HIGH PERFORMANCE



DAVID
SIBBET

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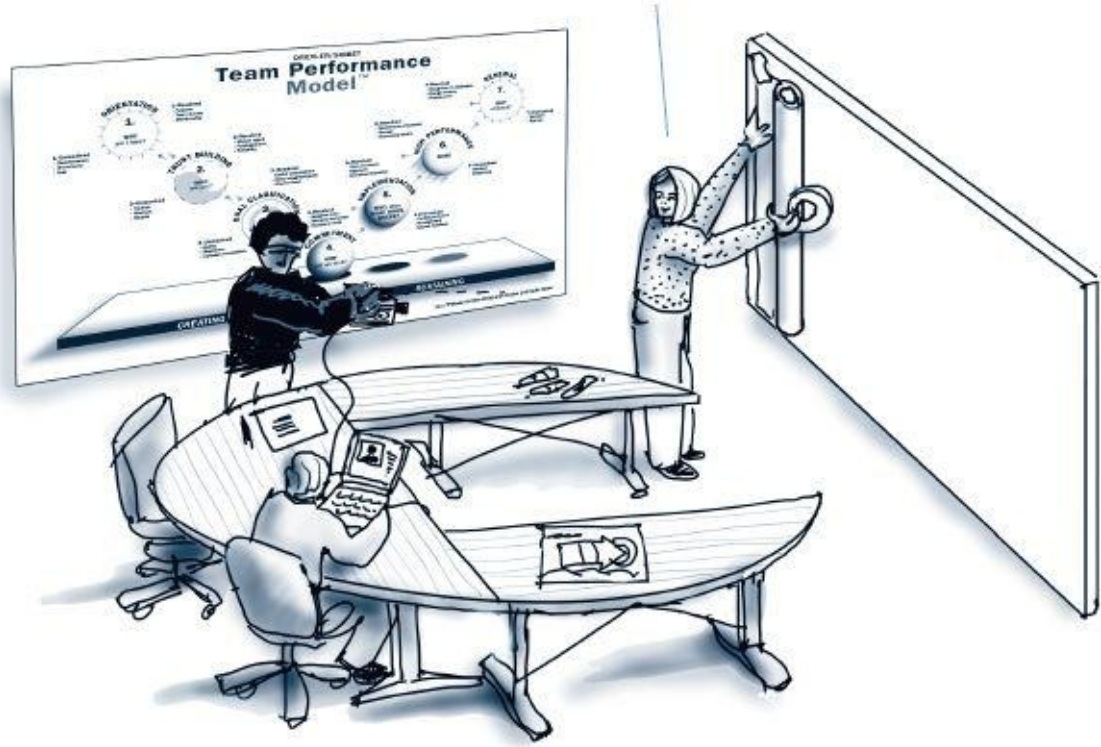
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CAN SEE THIS?





CREATE

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ARE YOU THERE?

VISUAL TEAMS

GRAPHIC TOOLS FOR
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SUSTAIN



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This book is dedicated to my inspirations, Arthur M. Young and Allan Drexler, and for all the young people worldwide who are working in teams and believe that collaboration is not only an effective but also a necessary competency in our times.

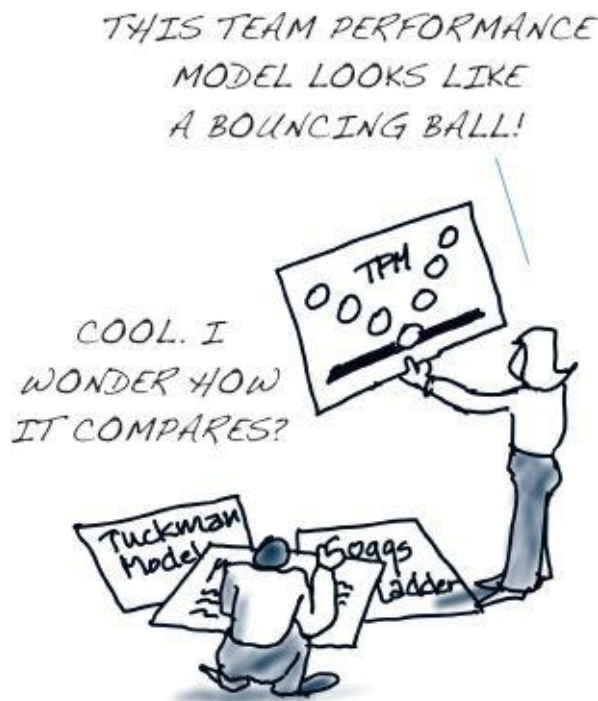
Introduction

Imagining Better Results for Teams

This book is an outgrowth of 35 years of working with organizations and their teams, helping people cooperate to achieve results. I've worked all over the world with large and small, private, nonprofit, and government organizations. During that time the principles and practices that guide this work have become clearer and stronger, and it is time to share these widely. In the past ten years particularly, the interest in these tools has increased dramatically, specifically the Drexler/Sibbet Team Performance Model (TPM) and a related system of tools that have been in development since 1980. Increasing the system is a standard reference in schools of organizational development, and is the system of choice at leading companies such as Nike, Becton Dickinson, and Genentech/Roche. This book provides the often-requested introduction to the use of these tools.

My Inspiration

My work with teams is inspired by three things. First is the long-held conviction that if the communications and innovation strategies that successful design teams use were generally understood, then the whole field of team development would benefit. I've found that working like a designer broadens my repertoire of tools when it comes to starting, improving, or collaborating on work that requires shared commitment, innovation, and high performance. Simply put, a visual team is a team that works like designers.



My second inspiration is my work with the Theory of Process formulated by Arthur M. Young. I came across this work in the 1970s. It is the most comprehensive system I know of for integrating the findings of contemporary science with traditional wisdom about how nature works. It has provided an invaluable set of lenses for seeing the patterns of process that underlie any kind of workgroup or team.

My third inspiration is Allan Drexler. He inspired my professional work with teams in 1981 when

met him in a workshop I was leading on graphic facilitation. At the time Allan was (and still is) an organization development consultant working with companies such as General Mills and R Donnelley. He was focusing on “matrix organizations” —the type of organization in which workers report to both functional managers in areas like manufacturing, human resources, and sales, and also to project managers of cross-cutting lines of business. The built-in conflicts these forms of organization generate are tough on teams. He was passionate about finding answers.

WHO IS THIS BOOK FOR?

New team leaders

Team members wanting better results

Managers wanting to support team environments

Leaders wanting to support creativity and innovation

Young people learning about groups

People interested in collaboration

Coaches

Human resources managers

Human resources development professionals

Consultants who work with teams

Nonprofits working with volunteers

At the time I met Allan I was immersed in working visually with groups and facilitating meetings and organizational strategy sessions. My book *Visual Meetings: How Graphics, Sticky Notes, and Ideation Mapping Can Transform Group Productivity*, is a summing up of this long experience. But I was also very interested in the larger problems of organization effectiveness. As I began working with Allan at General Mills, we began the exciting adventure of creating the Drexler/Sibbet/Forrester Team Performance System (TPS), synthesizing his rich field research in teams and my deep explorations of group process. Our goal was to create a framework for teams as useful as the Meyers-Briggs Type Indicators (MBTI) is for individuals. This intention has carried on since, resulting in engagement in a wide variety of explicit team-development efforts at companies such as Nike, Mars, Procter & Gamble, Mentor Graphics, Otis Spunkmeyer, W. L. Gore, Hewlett Packard, Becton Dickinson, Chevron, Agilent Technologies, the San Francisco Foundation, and the National Park Service.

My Motivation

When Richard Narramore, my editor at John Wiley & Sons, broached the idea of writing a second book after *Visual Meetings*, I immediately thought of the need to show how visual meetings integrate over time to get real results. But writing about teams would be a different challenge. There are many many resources on teamwork (a good number of the leading ones are listed in the back of this book). But I appreciated, being familiar with the field, that there still weren't many books touching on the application of new design and visualization tools to teams. I also knew that Allan and my work on the TPM had developed some fresh approaches to explaining team dynamics through the power of visual language. I'm not a researcher, but I believe that senior practitioners should share their experience as a contribution to the field. I agreed to write *Visual Teams*.

Since that commitment another deeper motivation has surfaced. I have been president of my own company, The Grove Consultants International, since 1977 (it's gone through a few name changes but is basically the same business). In that time I've been a team leader of our own and client projects.

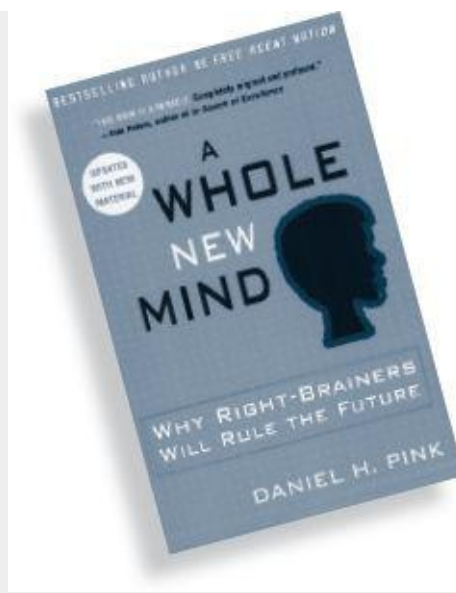
many, many times. I've also trained a large number of people who have learned their facilitation and consulting craft at The Grove. I know that collaboration can result in amazing, creative results. But I also know that collaboration is a learned capability, and effective teamwork is increasingly challenged by 24/7 work environments, virtual work, ideological divisiveness, and lean, overworked organizations. I am also acutely aware that the scale and complexity of problems in our cities, states, country, and world are also increasing. I see young people in Eastern Europe, the Middle East, and Asia calling for this in their own way. I see my own children and grandchildren heading into that same world. So my motivation has flowed well beyond my personal interest in teams. I feel a deep obligation to share what I've learned in a way that young people can benefit.

LET'S PLAY AROUND WITH
SOME OF THESE OPTIONS



Why “Visual Teams”?

Visual work has always been a feature at The Grove and in my consulting with teams. It stems from a lifetime passion for design and visual language. The success of *Visual Meetings* in reaching a new audience of beginning consultants, teachers, facilitators, and human resources staff convinced me that teamwork needs the same contribution.



A WHOLE NEW MIND

Daniel Pink introduces his popular book with this clear stance:

“The last few decades have belonged to a certain kind of person with a certain kind of mind—computer programmers who could crank code, lawyers who could craft contracts, MBAs who could crunch numbers. But the keys to the kingdom are changing hands. The future belongs to a very different kind of person with a very different kind of mind—creators, empathizers, pattern recognizers and meaning makers. These people—artists, inventors, designers, storytellers, caregivers, counselors, big picture thinkers—will now reap society’s richest rewards and share its greatest joys.”

(A Whole New Mind, 1)

I’m using the term “visual teams” to point at three developments that in the last 20 years have significantly broadened the choices of how to work together visually to achieve results.

- 1. The evolution of traditional design tools** such as white boards, markers, large paper, tape, cameras, sticky notes, and other tools. They are both higher quality and increasing interactive digitally.
- 2. The explosion of groupware and social media** since the early 1990s. Groupware includes all of the software tools designed for group collaboration, including the social networking tools. Most of these integrate text, graphics, and video, making it possible to work visually across a wide range of media.
- 3. An accelerating interest in “design thinking” and innovation.** Competition from emerging economies increases every day and puts a premium on creativity. The popularity of Daniel Pink’s book, *A Whole New Mind: Why Right-Brainers Will Rule the Future*, is the crest of a wave of research on cognitive psychology, neuroscience, and emotional intelligence, all pointing to reasons why working more like designers and artists is not only possible but desirable.

We live in a time in which graphics and text are dancing together continuously on our websites, smart phones, magazines, ads, and television. Was there ever a culture more visually stimulated and literate? There is no reason why teams cannot take advantage of all of this. Perhaps they do not realize how easy it is.

The “West Coast” School of Facilitation

The Grove is part of a West Coast (of the United States) school of facilitation and organizational work heavily influenced by the way designers and architects work. (It’s spreading rapidly, so many of you

wouldn't associate it just with the West Coast.) For several years after college I was determined to become an architect and even enrolled in school. But a job offer from the Coro Foundation turned me in a new direction toward leadership development in the public sector (I was a Coro Fellow in Los Angeles right after college). But my interest in design sustained itself as I took my passion for visualization into the realms of information architecture, graphic design, learning materials design, and process design. Initially I supported seminars with Coro Fellows as they learned from their field experiences, and then worked for years on strategy-consulting projects. I developed a strong practice helping architecture firms with their strategies, and have worked extensively in Silicon Valley with design teams at Apple, HP, Agilent Technologies, Juniper Network, and other high-tech firms. I know how interface designers, software designers, chip designers, and other people in "maker" culture work.

THE IMPORTANCE OF DESIGN THINKING

Tim Brown, CEO of IDEO is one of the leaders in the movement toward design thinking. He writes:

Design thinking taps into capacities we all have but that are overlooked by more conventional problem-solving practices. It is not only human-centered: it is deeply human in and of itself. Design thinking relies on our ability to be intuitive, to recognize patterns, to construct ideas that have emotional meaning as well as functionality, to express ourselves in media other than words and symbols. Nobody wants to run a business based on feeling, intuition, and inspiration, but an overreliance on the rational and the analytical can be just as dangerous. The integrated approach to the core of the design process suggests a "third way."

(Change by Design, 4)

As I explained in *Visual Meetings*, both David Straus and Michael Doyle, founders of Interaction Associates (IA), were trained architects. They pioneered facilitation as a profession in the 1970s, and one of their first projects was writing *Tools for Change* with a Carnegie Foundation grant. Its goal was showing teachers and others how to use the problem-solving approaches of architects and designers in the classroom!

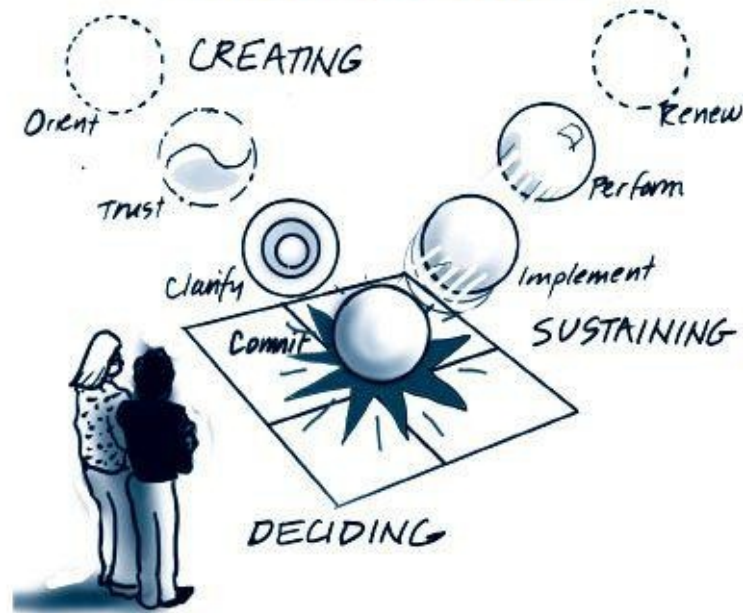
Geoff Ball, who worked with Doug Englebart and was another pioneer in graphic facilitation, was trained as an electrical engineer. We all approached collaboration the way that architects approach design—playing with patterns and prototypes, visualizing contexts and visions, modeling proposals, and recording everything on paper. My work with Apple Computer during the 1980s convinced me that working like designers was a key to innovation.

The new technologies coming out of Silicon Valley have had a shaping influence. During the 1990s I led The Grove side of a strategic partnership with the Institute for the Future (IFTF) in Palo Alto on the Groupware Users Project, one of the first efforts to research and map the growing amount of technology and software directly designed to support teams and collaboration. The IFTF and The Grove recruited what grew to be four dozen client organizations and agencies. They supported us in writing one of the first books on groupware, holding twice-a-year user exchanges, and conducting several focused research efforts and reports each year. These tools have evolved to define a huge suite of choices for teams that are empowering distributed work, applications of visualization and multimedia to meetings, and ever-expanding possibilities for innovation. The project continues to this day as the IFTF Technology Horizons work has pushed into the areas of social networking, crowdsourcing, games, and simulations.

Visual Teams pulls all these threads together in a book showing how your teams can work like designers, even if you can't draw or don't think of yourself that way.

HE
EXPLAINS
ALL
THIS!

DREXLER/SIBBET TEAM PERFORMANCE MODEL



As you will find in one of the chapters on the use of technology with teams, the TPM guided our work with IFTF and provided a structure for thinking about what-to-use-when across the full range of predictable stages of team development. We considered that and other methodological tools such as Group Graphics as forms of groupware.

What Is in This Book?

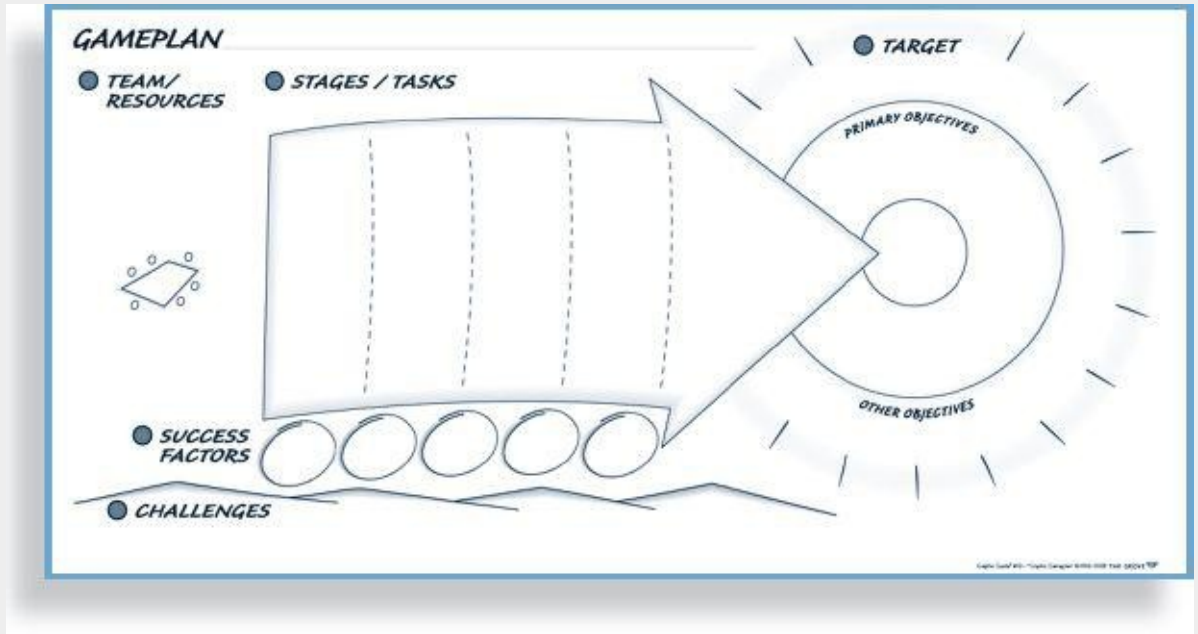
Visual Teams pulls all of these threads together in a book showing how your teams can work like designers even if you can't draw or don't think of yourself as visually inclined. The book is written in seven sections that each have several chapters. Each chapter is summarized on the section pages, so you will just provide a general overview here. If you find that a given chapter is already familiar to you, the book is designed so that you can skip ahead to the relevant sections. It's also designed for having as much fun scanning through and reading all the side stories as diving in for a full read.

Section I, "What Is a Visual Team?" provides an overview of visual teams and the Drexler/Sibbet Team Performance Model, the working language of the book. Its chapters elaborate on the case I'm making here that design professions, such as architecture, graphic design, information design, software design, website design, and even urban design, hold a storehouse of methods and practices for the rest of you who might not consider yourselves designers. It provides you with some initial tools to assess what kind of team you are leading and what the opportunities are for becoming a visual team. The chapter on the TPM will provide you with a panorama of all the key challenges and success factors for any kind of team, including visual teams, and indicates the specific opportunities for becoming more visual and where it provides benefits.

GRAPHIC GAMEPLAN FOR NEW TEAM STARTUPS

Section III will detail how to use this most popular of all The Grove's Graphic Guides. An earlier form was also the fi

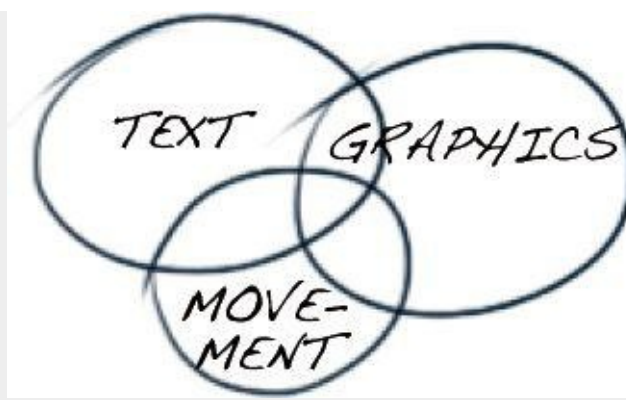
graphic template I ever saw used—by Geoff Ball—and convinced me to jump into graphic recording years ago. It built off of a deeply embedded metaphor—that planning is like a journey. A good action plan describes where you are, where you want to go, and how you plan to get there.



Section II, “Leading Visual Teams,” directly addresses the situation in which a lead performer has been placed in charge of a team for the first time and wants to succeed at the job. If you are in this position, this section will describe tried-and-true principles and practices. It identifies the four basic tasks of a team leader, and the inner work required to be an excellent one. It frames the challenge of team leaders as one of integrating attention to purpose, energy, information, and operations in a smooth, ongoing flow of work. I also step back and reflect on how more senior leaders can work to support a team environment of innovation, and use assessment tools to develop ongoing teams. As you will come to see, an effective team is a partnership between internal leadership and external organizational support. Managing this connection is a key leadership job.

CREATE
A TEAM

Section III, “Visual Team Startup—Creating Trust, Focus, & Commitment,” steps you through what the TPM calls the “creating” stages of teamwork. These chapters provide specific guidance on orientation to purpose, trust building, clarifying goals, and committing to a common direction. Workgroups that don’t have to cooperate closely while actually doing the work will benefit a great deal from this section. You will also find that the more ambitious your goals are in terms of high performance, the more investment you will need to make in these early stages of teamwork. These are the foundation upon which later stages depend.



VISUAL LANGUAGE

Bob Horn is one of the first to write comprehensively about visual language. He says:

We are just at the beginning of another communications revolution—the modern equivalent of the one that Gutenberg sparked (with the printing press). The visual language revolution is taking place alongside other communication revolutions—the World Wide Web, animation, three-dimensional virtual reality, and intelligent and interactive visual elements. The new mix of technologies and techniques will irreversibly alter communications in the 21st century.

(Visual Language, 240)

SUSTAIN
A TEAM

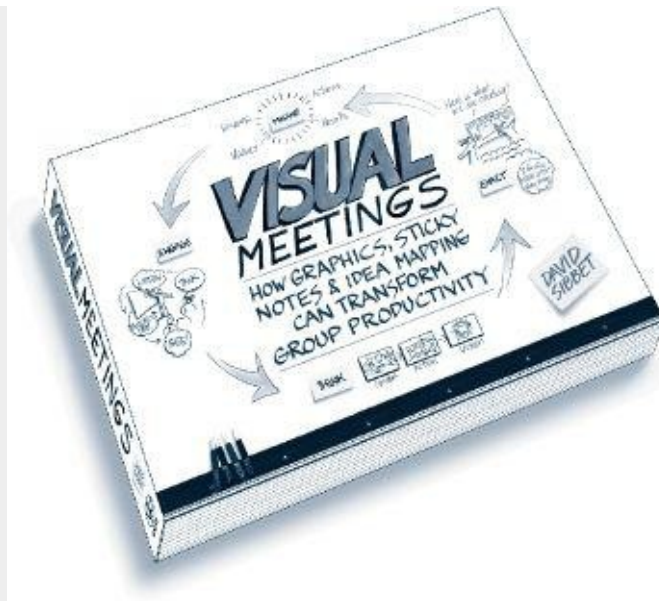
Section IV, “Sustaining Results—Innovating for High Performance,” deals with the three stages of team performance after committing to be a true, interdependent team. I share tools for project management and tracking progress, making persuasive visual presentations, using graphs and communications and rich metaphors to guide and inspire high performance, and ways of using visualization to support knowledge sharing and organizational improvement in the area of teaming. I also share the story of a high-performing team working to create a multistate environmental cleanup network.

Section V, “Growing a Visual Team Culture—Thinking BIG About Opportunities,” specifically deals with how you can introduce the idea of visual meetings and visual teams to your manager and organization. It argues for ongoing learning and development in this area, and the importance of having robust shared language for teaming—especially if your organization is working globally and/or over multiple sites. The TPS, because it is based on the Theory of Process, functions like an operating system for groups. In those organizations where visual teams have flourished, the human resource development people who supported the trainings found the approach informed much of their other training work as well.

Section VI, “New Technology Tools—A Revolution in Visual Collaboration,” directly addresses the opportunities for virtual teams with new visualization software. This section opens with the rich story of the Groupware Users Project team, a truly high-performing visual team. You can see through the lens of this story how the tools and methods described come to life in a real, ongoing team. Specific chapters on web and teleconferencing, tablets, team rooms, social networks, and mobility follow the IFTF story. I am not trying to write a comprehensive book here on virtual work, but to share the tried-and-true visualization methods we’ve explored and know work well. I do speculate on where this area seems to be heading.

Section VII, “Links, Tools, & Other Resources,” suggests sources for developing a more general understanding of teams. The Grove engaged two Coro Fellows in civic affairs to help us research the

area and document the leading tools other than those provided by The Grove. We've identified websites that have particularly useful information, as well as links to the many tools The Grove provides.



VISUAL MEETINGS BOOK NOW IN FIVE LANGUAGES

This initial book on how to use interactive graphics, sticky notes, and idea mapping for group collaboration has been a best seller. It was published in August of 2010 by John Wiley & Sons and is now in Chinese, Brazilian Portuguese, Dutch, Korean, and German. *Visual Teams* shows how to apply these ideas across the full arc of a team process.

A Summary of Visual Meetings for Those Who Haven't Read It

Visual Teams builds on my book *Visual Meetings*. For those of you who haven't read it, the following summary should provide some context. As I said in the introduction to that book, I've written many books for professional graphic recorders, facilitators, and consultants that we've published through The Grove. *Visual Meetings* with John Wiley & Sons was written for the legions of people who are not artists or necessarily good at drawing but still want to get in on the visual revolution.

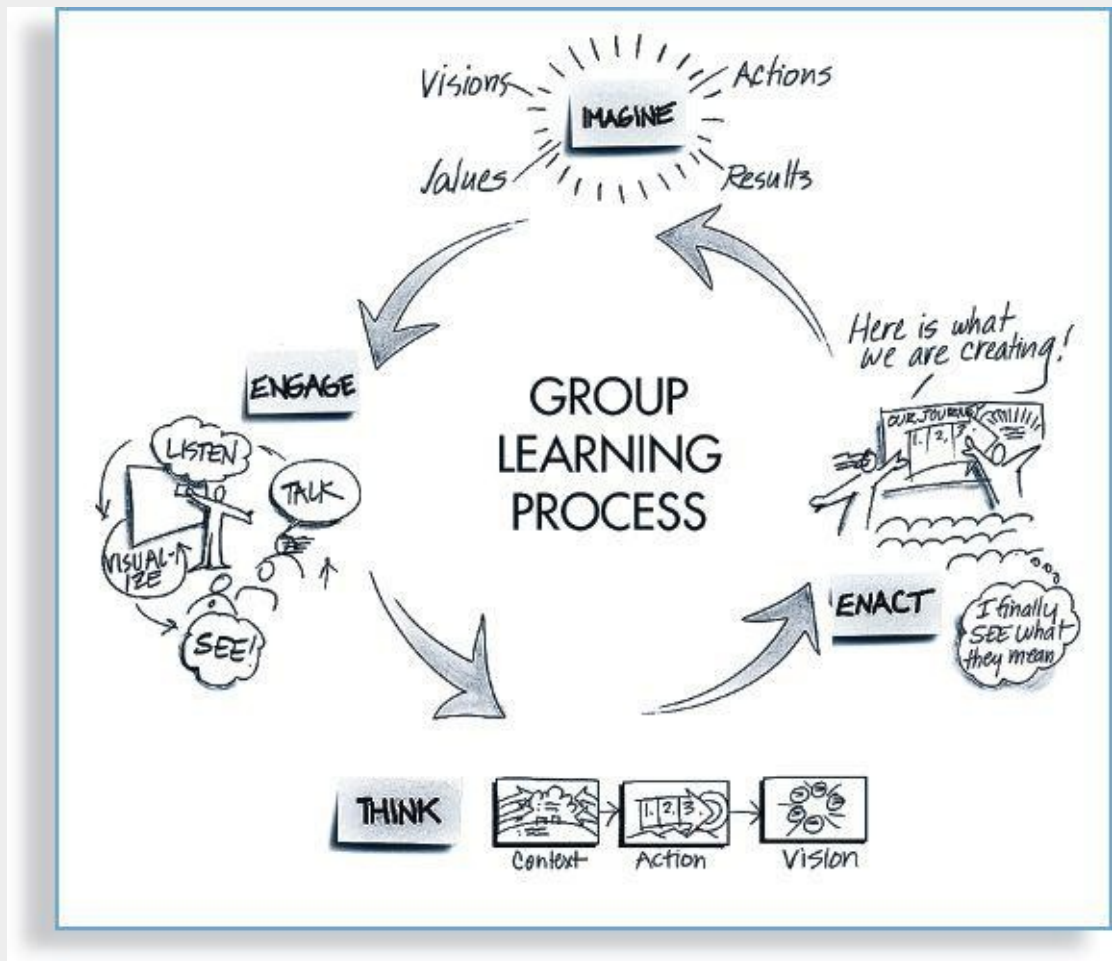
Visual Meetings describes how graphics and visual language can support group process through the entire cycle of learning, from IMAGINING through ENGAGEMENT through THINKING through ENACTMENT. With many examples and stories, I paint a picture of how the design environment of the West Coast of the United States gave rise to highly visual and design-oriented ways of working in meetings, far afield from the specific design professions of architecture, engineering, graphic design, and other fields. (This point of view will be expanded upon in this book.)

Visual Meetings to Spark Your Own Imagination

To begin with, I explore how visualization can be used to have meetings with yourself to stimulate your own imagination, through journaling, metaphoric thinking, diagramming, and other visualization strategies. "Paper is brain interface" as Paul Saffo, a forecaster member of the Groupware Use Project, liked to say. Drawing is the way we develop new perspective, especially in regard to thinking about systems. I suggested ways to use forced metaphors to expand your thinking about your own practices and business, by, for instance, comparing your business to a garden and identifying all the plants as different kinds of clients.

MODEL FROM VISUAL MEETINGS

Visual Meetings is organized around this group-learning model. It illustrates the ways visualization is used for all four stages in the insight-to-action process.



I recommend people read Dan Roam's excellent books, *Back of the Napkin: How to Use Graphs for Selling and Problem Solving* and *Unfolding the Napkin*, in addition to *Visual Meetings*.

Visual Meetings for Engagement

IMAGINE

The second part of *Visual Meetings* deals with interactive graphic communication as a superior form of engagement for groups. I compress some of the rich information in the comprehensive book called *Graphic Facilitation: Tapping the Power of Groups Through Visual Listening* (available through The Grove) and demonstrate that anyone can create the simple frameworks and icons used in visual meetings. I provide a graphic overview of the way we train people to unlock their drawing capability by having them practice at large scale, and some of the most common ideographs and pictographs people use in graphic recording.

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