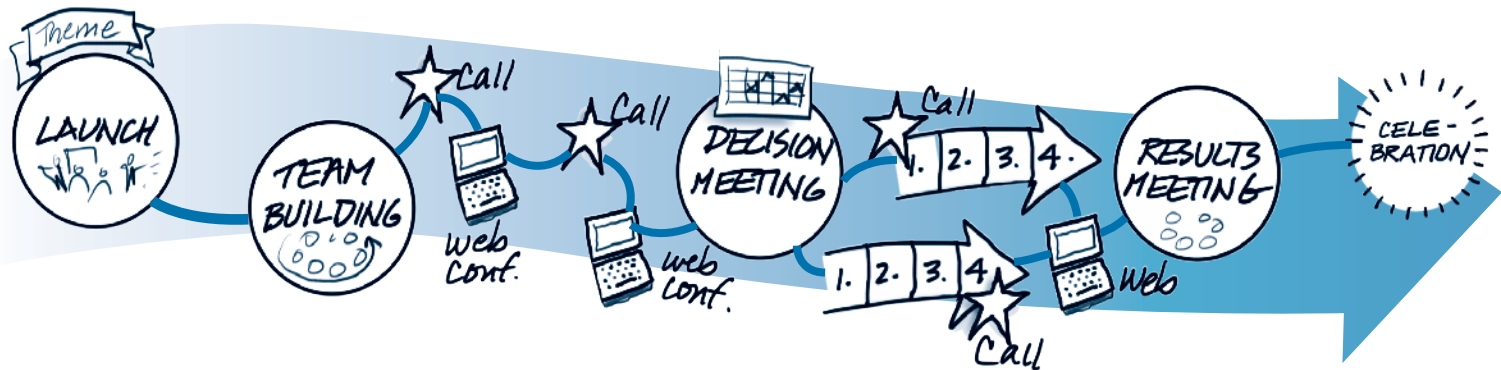# I: What Is a Visual Team?
Using Graphics Across the Whole Workflow

I: What Is a Visual Team?

Chapter 1: Working Like Designers The book begins with a link to *Visual Meetings* and the idea that the ways of working coming out of design teams in Silicon Valley and other centers of innovation are transforming the way teams work in general. Themes in the book are introduced through the story of the Boise LasterJet Advanced Sales Teams.

Chapter 2: Why Be a Visual Team? This chapter explores the difference between workgroups and teams, and shares a tool for assessing the difference. It introduces a graphic portrayal of the types of teams and some opportunities for visualization.

Chapter 3: A Graphic User Interface for Teams This chapter describes the TPM, its key success factors, and reviews my work with Allan Drexler in setting out to create a "Meyers-Briggs" of team building. It will review the assumptions we made in its design and provide pointers for deeper study. I explain the reasons for moving from a "building" to a "performance" metaphor and using a "bouncing ball" as a graphical user interface for thinking about team process. It will also show how this framework bridges to other popular visual frameworks for thinking about teams.

1: Working Like Designers
Why Visual Teams Get Results

Let us begin our exploration of visual teams with a story about a task group at Hewlett Packard (HP) that deeply shaped my thinking about what was possible when a team learns to use visualization to support its work. Then, in the following chapter, I'll describe the specific, practical ways visualization can help your team. Remember, this book is designed to be scanned as well as read, so if any chapter isn't relevant to your situation then just skip ahead!

Help Us Present to Management

When Susan Copple called and asked if I would help a team at HP's Boise Printer Division prepare a visual presentation for top management, I didn't suspect that we both were on the edge of a breakthrough assignment that would transform the work of my company, The Grove Consultants International, and many HP divisions that picked up on our success. I initially thought it was just an interesting communication design job.

"Our team is a cross-functional task group that has been assigned the job of finding our next billion dollar businesses," Susan said. "We've been at it for about two months, but are running into some challenges in figuring out how to present our findings. Can you help us design our presentation of findings to top management?"

Susan was the quality professional on the team and had worked with me before. She told the team that I was a designer who helped with presentations, even though most of my work at the time was as a strategy consultant, facilitating visual meetings and change processes. But several decades of visual work and design of many different reports and output media from meetings left me quite experienced in what is now thought of as "information design" or "presentation design." Susan knew this. She also knew the team wasn't looking for help with its work, but how it could communicate it.

We have been assigned the job of finding our next billion dollar businesses . . . Can you help us design the presentation?

COULDN'T HE PICK A SMALLER EXAMPLE?

I THINK HE WANTS TO SHOW THE TRUE VALUE OF A VISUAL TEAM.

At that time in the mid-1990s, the Boise Printer Division was one of the most successful within HP, and had in fact set records as the company's first billion-dollar revenue division. Personal computers and LaserJet printers that often accompanied them had exploded in sales growth following the initial HP printer's introduction in 1984. Profits rolled in. But successes in high tech don't last forever. Top management picked Jim Lyons, one of its most creative marketing leaders known for new ideas, as well as some other promising staff at their Boise site to conduct a two-month research project and recommend where to look for the division's next big wins.

TELL ME YOUR HISTORY

At the beginning of any team consultation it makes sense to know how it came to be and what work has been accomplished so far. This is the way we began with the Boise LaserJet Advanced Sales Team as they began to consider how to design presentations to top management from their research finding the next big opportunities for the LaserJet division at HP. Mapping the story visually is a guaranteed way to get everyone talking.

What's the Challenge?

Jim, Susan, and some of the team met me in a conference room at the San Francisco airport on one of their trips to headquarters. I brought large paper and magic markers. I asked team members to introduce themselves and tell me the story of their project. I found out they were called the BLAST team, for Boise LaserJet Advanced Sales Team. They repeated the goal Susan had shared with me, which was to identify the next multi-billion dollar business opportunities for their division. Soon I had six-to-seven feet of graphics detailing out how they received the request, conducted internal research by phone and e-mail, held many meetings to begin making sense of their findings, and were now facing the job of figuring out how to report that to their management. They didn't want their report to be the end of it. They really liked their ideas and wanted to see the division move on them.

But I began to feel that something was amiss. It was a gut feeling, not anything anyone said really, but the team didn't feel at ease with its work. Jim was a very bright, somewhat tightly wound manager who had lots of ideas. Another engineer and a business-planning professional were pretty active in the conversation. Trusting my instinct, I asked if there was a problem.

"Yes," Jim said. He went on to explain that in the relatively recent history of the division, two prior teams had been assigned similar projects, and at the point of sharing their results ran right into a wall of resistance and even hostile response from upper management. "It was a career-limiting experience for many on the team," he said. This new team was scared stiff that it would come to the same end. So this was the underlying reason they wanted outside help. They simply weren't confident that their traditional strategies would work. This challenge gave them the courage to step into becoming a truly visual team, innovate, and surpass all their original thinking about what was possible in a situation like theirs.

Thinking Like a Designer

At this point in the meeting I was working like a designer. My mind was racing with possible "solutions" to their problem, even though I really didn't know enough yet to be confident of any. But this is what designers do—they let themselves play with ideas in various stages of realization. Let me depart from the story a bit, and take you inside some of the thoughts that at the time were flashing through my mind.

Even though there are many kinds of design, design teams have much in common across all disciplines. Design teams know that something needs to be produced to fulfill specific goals and objectives, often within specific constraints and criteria—budget limitations, specified materials, and the amount of time that can be spent on the project. The excitement of design is being creative within these constraints.

Design is also, in most cases, a collaboration among many different people who have a stake in the outcome. Anybody who has worked this way much, be it designing a meeting, designing a new organization, designing a presentation, or designing a product or piece of software, knows that early ideas will evolve as users give feedback. In software design in particular, a process called

Design teams know that something needs to be produced to fulfill specific goals and objectives, often within specific constraints and criteria.

"agile development" explicitly presents solutions that are just good enough to deliver some value, and then iterates and improves them at a rapid pace. Brainstorming many ideas, playing around with tests and what are sometimes called "prototypes," working quickly, and making improvements are all basic tools in a designer's tool kit.

If this sounds like a description of any productive project team, you are reading my mind. Many project teams are implicitly being asked to work like designers and come up with something specific. This is precisely what brought me to write this book. After years of working with visual meetings and applying many tools like the ones I just described, I've come to appreciate that design thinking is a generally useful way for any team to work that needs to both produce results and be creative.

I knew what the goal of the BLAST team was: multi-billion dollar businesses. I also appreciated another hidden goal, which was to have this experience be a career-building experience, not a career-limiting one for the team itself. And I appreciated the constraint of only having a few more months to pull everything together, and of having the report presented to one of the most successful management teams in the entire HP business—the vaunted LaserJet management!

Initial Assumptions

From the time of the first phone call, some initial assumptions about the BLAST team's challenge guided my work. These are products of many different experiences and study of organizations. It's the mental "software" of any consultant or designer. The key is to be aware of them.

- Successful people (and organizations) may think they are open to new ideas, but they have a lot of attachment to current success.

- For people to accept anything new, they need to experience and feel, not just think about it.

Brainstorming many ideas, playing around with tests and what are sometimes called "prototypes," working quickly, and making improvements are all basic tools in a designer's tool kit.

- Slide presentations are often one of the least-involving ways to engage people's feelings.

- I immediately assumed that the management group to which the BLAST team would report was very smart and very happy with its success, and needed to be fully involved in the excitement and potential of the new ideas if they were to have a prayer of coming true.

How Could We Get True Engagement?

I knew from long experience with visual meetings that using large murals is a very involving way to present. They allow the user to tell stories and hop around in response to questions in ways that a fixed presentation can't. Susan knew of The Grove's work in this area for other parts of HP and I assumed that was probably one of the reasons she thought I could help. The team immediately agreed to avoiding slides, but didn't have experience with being a visual team in a true sense. And I didn't think eye-catching murals would be involving enough.

I then reflected on what I know is true universally: that everyone LOVES to see drawings and sketches unfold in real time. But it didn't seem possible to use graphic facilitation or live recording as a way to present about this subject. Management was looking for answers, not a facilitation experience.

Like many designers, I've found that holding two seemingly unrelated ideas together and seeing if I can make a connection can often spark some original thinking. In this case it did. My one idea was to use murals. The other was that live drawing is engaging.
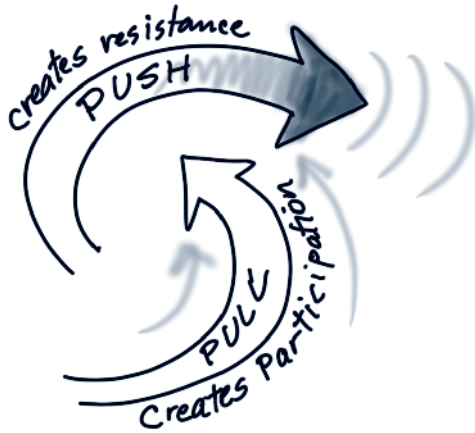
Breakthrough Idea!

"Is there a conference room anywhere near the management team's offices?" I asked. The BLAST team looked puzzled. "Yes," someone said. "Why do you think I find this interesting?" I asked. They were still puzzled.

WHAT ABOUT A THEATER OF IDEAS WITH MURALS!

"PUSHING" INCLUDES

- Dense slide content
- Fully formed ideas
- Direct instructions
- No interaction

"PULLING" INCLUDES

- Simple, open frameworks
- Incomplete ideas
- Questions
- Invitations
- Interactive visualization

"I have an idea," I said. "What if I flew out to Boise a couple of days before your presentation, and we, as a team, created the big murals in the conference room during those days?"

A huge smile spread across several faces. Of course! Management would not be able to stay away, and like camels poking their nose under the tent, would come in and get to see all the ideas emerging in real time, with real drawing, and lots of engagement! And if they didn't come, we knew we could get them to! This would ensure that the ideas weren't experienced as a big PUSH in the face of the successful managers, but would PULL them in.

For those of you who are familiar with facilitation or have read *Visual Meetings*, you will recognize the push/pull idea—a very useful way to think about group dynamics. Pushing—which is presenting content, requests, answers, or anything already worked out—usually creates resistance and "push back." Pulling—which involves asking real questions, having blanks and open spaces, using silence, waiting—creates participation. Nature abhors vacuums and so do people.

Creating True Engagement

So our team now had a working idea, but the challenge was to identify which murals we would create in this workshop setting as part of the presentation. Again, as a facilitator of many planning sessions in organizations, I had more assumptions.

- People's understanding of new ideas is filtered through past experience.
- People's assumptions about context are as critical as responses to the new idea.
- If new ideas can find a basis in past success, they have a better chance of being adopted.

"Context" is a word for everything that surrounds an idea. In the case of the BLAST team it included the division's relationship with its own larger group within HP and the company as a

whole, and it included its assumptions about how long the printer market would hold, workforce capability, and so forth. To get their new business ideas to take root the team needed to describe the soil and environment.

I began asking the team questions about the history of its division. I was actually looking for something very specific. I wanted to discover where in the past this particular management team had succeeded by being rebels and risk takers. I knew if the team could connect top management with its own risk-taking experiences early in the presentation, it would be more receptive to the BLAST team ideas.

It didn't take long. A clean sheet of paper went up. On it I drew a simple time line and led a fast, half-hour review of the recent history of the division. In 1992 the Printer Division had experienced several failed projects that cost a lot of money and put the division in the crosshairs within the company. Everyone was on edge. They had to get a "win."

Laser printing had been a new technology in the marketplace ten years prior, when the original LaserJet came along. Apple Computer had a competitive model introduced somewhat later, and delivered the concept of "Desktop Publishing" to the market. Boise LaserJet's offering was strong and as an "everyman's" solution sold like crazy. The LaserJet management, led by Dick Hackborn (who went on to become a very influential board-of-director member of HP in the 2000s), went against corporate policy and brought out a laser printer that would hook up to any PC, and eventually Macs as well (see side story). It rocketed to success. At the time of the BLAST team's work the division was a highly profitable and still growing multi-billion dollar hardware and toner business. So current management success was rooted in being rebels!! What luck. "We should make one of the murals be a summary of this history and you should lead with that story," I suggested. Everyone loved the idea.
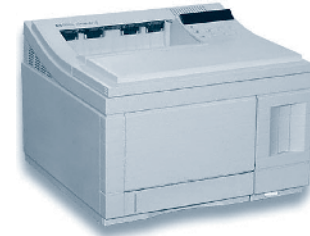

HP LASERJET 4

The HP LaserJet was the first in a series of laser printers, launched in 1984 and continuing on in many versions (the 1992-vintage LaserJet 4 is shown here). Over the years numerous models have been designed for home, small business, and corporate use, incorporating other functions such as scanning, copying, and faxing, and offered in color as well as the original monochromatic (black and white) printing capability. It was without question one of the most successful printers of all time, and spawned many of the HP printer lines we see today. Attesting to its popularity and longevity, an extensive and ever-growing history of the LaserJet can be found on Wikipedia at http://en.wikipedia.org/wiki/Hp_laserjet. Laser printers are one of the technologies responsible for the revolution in visualization in business communications.

MURAL IDEAS
Here are some of the concept sketches for the BLAST team murals.
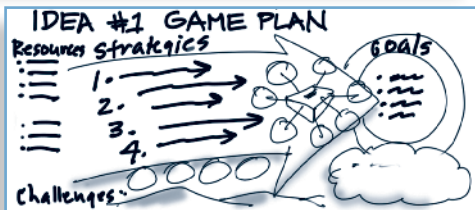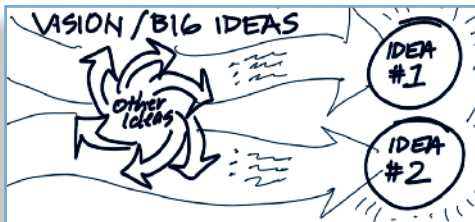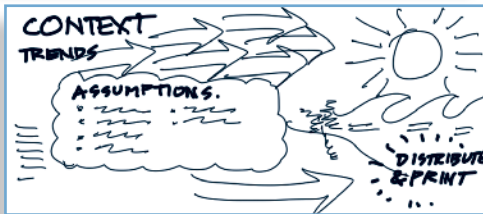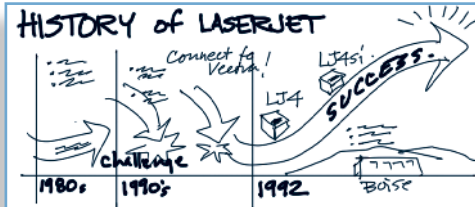
The other murals took shape. By that time I had already begun to develop standard frameworks for visual meetings. These graphic templates weren't actual preprinted tools as they are today, but were developed in our practice.

We decided on the following murals:

1. **History of the team**—showing all their interviews and research (to build credibility)

2. **History of the division**—to anchor the presentation in past success of being risk takers

3. **Context map of the current printing environment**—to frame the proposals

4. **Team visions of the opportunities**—outlining their big ideas in a general overview

5. **Three game plans**—one for each of the big ideas; two clearly defined and named initiatives, and a third, more general, process-oriented opportunity.

This made seven in all. The BLAST team would wrap the management in a theater of thinking!

Solving a Prioritization Problem

I touched in with the team once before the big event to help it review its content and sharpen the big ideas. This was a standard visual meeting in which I was graphically recording the conversations of the team, and using all the tools described in *Visual Meetings* to help the group come to a good conclusion about what it would do.

This meeting surfaced another design challenge arising from the team's struggle with all the juicy additional ideas beyond their two big ones. They simply couldn't agree on which to present. Because my role was that of a presentation designer, they didn't mind my chiming in with some

thoughts. My mind began to apply another type of design thinking, which is to turn problems on their heads and look at them as assets and features.

In this case I thought, "what a bounty, to have so many ideas." If an organization wants to have ongoing innovation, wouldn't they want to have a kind of greenhouse operation or set of projects that could test and prototype new things on an ongoing basis? I began to think about where in other areas this is true. I could imagine a farmer having two main crops, and then a side field with lots of other crops. We decided to illustrate the third recommendation as a tractor pulling what looked like a plow with all the additional ideas as little arrows attached to a big frame. We had a working plan.

Using Subteams and a Shared Workroom

I flew to Boise three days before the big presentation with a big role of paper, magic markers, and dry pastel chalks. (I've found that dry pastels can create effects that look like an airbrush if you rub the colors in with tissue paper.) I knew that if the team was to work like designers and help cooperate on the murals, it needed a structure in which to work. I'd already seen that the team could flounder a bit with completely open conversation. I also knew that to draw these murals, I needed agreement on the wording.

The way we set up the workshop was a new experience for me, and really worked. Jim, as leader of the team, had the most knowledge related to which recommendations the team should actually advance. He and a couple of others needed to make some final decisions. Others were good at internal communications. I was the lead creating the actual murals, but wanted someone familiar with the team's recommendations to watch over me and answer any immediate questions about wording. We came to a design that broke the BLAST team into three parts.

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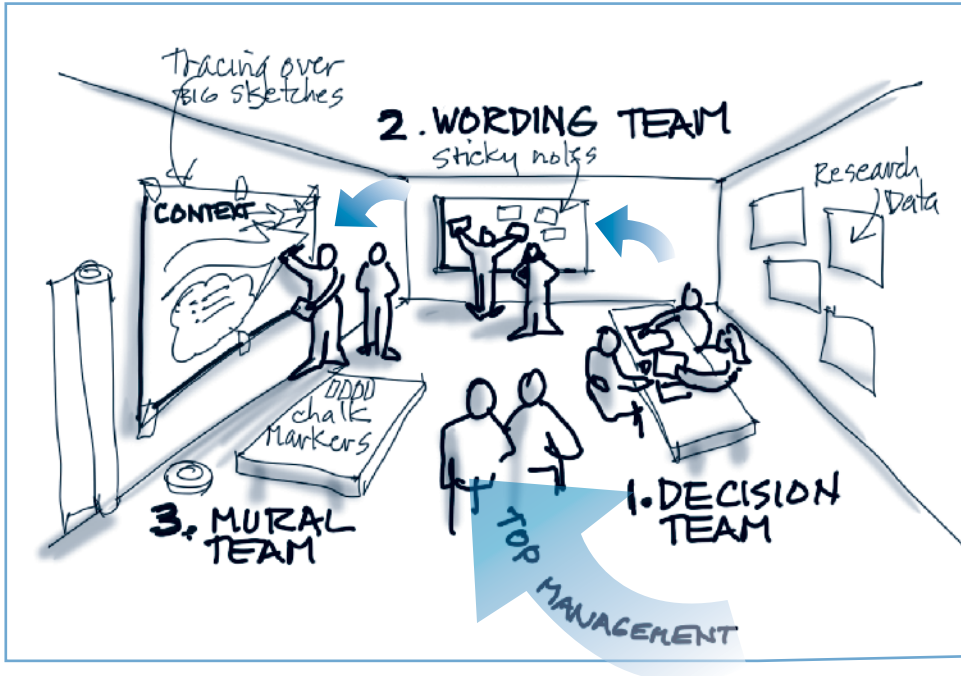
1. **Decision Team**: Jim and two of the most knowledge-able members would settle all remaining issues having to do with the content of what they would present—such as deciding on the names of the big ideas and the main features.

2. **Wording Team**: A second team of two would take the information BLAST wanted to present and determine the precise words that needed to go on the chart, using sticky notes and a rough sketch of the mural.

3. **Mural Creation Team**: I would draw the mural, work-ing with one other person to answer any questions I had and make sure I was accurate.

Ground Rules Helped

As a team, we all agreed on some ground rules that helped make the process possible. I knew we would have to work productively, use the power of both hierarchy, as reflected by the three teams, and group consensus, working as a whole team. Bringing in an idea from the teams I'd seen work at Saturn Corporation, General Motor's new car company that was completely team-based, I suggested that if anyone ran into a problem or question on their team that they could not handle, they could "stop the line" and call a quick meeting of the whole. I asked if I could do the same, functioning as the outsider representing the uninformed audience. By this time the team's trust was high, and they liked the idea. We were soon off and running!

And what fun it was. The conference room was fairly small, and got steamy pretty quickly. Sure enough, top management couldn't stay away. They were very apologetic about peeking in, but were fascinated.

THE BLAST TEAM WORKROOM

In a conference room near top managements' offices, the BLAST team created an assembly line of three subteams to create the Big Ideas presen-tation. Top management couldn't resist coming to get a preview, and became fully engaged. The visual environment made it possible.

I worked out a way of doing a fast sketch for the mural designs to get spacing and visual ideas, and then putting a large piece of paper over the top. The poster-maker bond that I was using was transparent enough that I could see through, essentially tracing and improving the work underneath. This business of doing versions of drawings is a standard method architects and designers use to think through ideas. Three, four, or five versions result in a design that comes alive.

Success on Success

The actual content of the BLAST team's presentation is and was proprietary, and not essential to understanding the power of this story. I flew home after the murals were done, and the team went into its presentation, creating a theater of ideas for their managers, each taking a part in the presentation. Because the managers had already seen the murals in the making, the presentation became a celebration. Not only was the BLAST team roundly thanked, but also the top managers decided to use the murals as the springboard for their annual strategic planning meeting, which they invited me to facilitate, and the group-level managers decided to do the same thing at their strategic meeting.

I heard later that indeed Boise LaserJet did create some new businesses around the ideas, and that members of the BLAST team in several cases were tapped for the new work. Their assessment of the industry moving to a "distribute and print" paradigm was far-sighted and became a generally understood vision within the printing groups of HP, including the InkJet side of the house,

BLAST TEAM CONTEXT MAP

The Boise LaserJet team chose to assemble all the assumptions it was making about the printing environment on one large mural to set the stage for their presentation of the next billion-dollar businesses to pursue. This is a black-and-white version of what was a very effective, full-color final version.

NOTE FROM JIM LYONS

It has been great to have a chance to reflect back on the BLAST team and its impact on the HP printer business. After working on communicating the BLAST ideas far and wide within the company for a number of months following the return of our cross-functional team to their "day jobs," I was asked to head up one of the two business initiative areas that the team had identified, and worked closely with another colleague who led the other initiative for some time. After a great career at HP spanning 25 years, I chose to leave the company in 2005 to pursue teaching and writing. This led to a position as Senior Editor of Lyra Research's The Hard Copy Observer, an industry newsletter (now online) that for 20 years has been the "voice" of the printing and imaging business. In that role, I still follow HP, the clear leader over so much of the printing and imaging domain. And now, what are the company's two biggest strategic initiatives?—1) cloud/mobile printing, taking advantage of the shift from PCs to mobile devices; and 2) managed print services, again taking advantage of larger customers (corporate and the like) to have comprehensive management of their printers, all-in-ones, copiers, and supplies, in a cost-effective way, often highly integrated with their other IT activities. Looking back to BLAST and our two "Big Ideas," despite numerous twists and turns along the way, there is a high correlation, and clear recognition, between our two recommendations and the current strategy.

and even beyond to the industry at large. So the BLAST team achieved both of its goals—the primary one of identifying new large business for the division, and conducting a "career enhancing" process. Jim Lyons' note in on this page tells that story.

Let's turn from this specific example to look more generally at why visual teams are better positioned to get results than ones that don't use visual meeting and planning methods.