

# Part One: The Visual Leader Advantage



## **Part One:** **The Visual Leader Advantage**

**1: Seven Essential Tools** This book begins by reviewing the most essential tools for visualization that a leader should have in his or her toolkit. Part Three will elaborate on these. This overview covers the use of metaphor and models, graphic facilitation, graphic templates, decision theaters, roadmaps, storymaps, video, and what you can do with virtual visualization.

**2: Seeing Results in Action** This chapter tells the story of visual leaders in a health-care organization who learned to use many of the essential tools indicated in this part. They were not skilled at drawing or experienced at visualization but got terrific results and moved to make visualization a standard way of working in their organization. The case is interleaved with practices you can use right away.

**3: How to Run Visual Meetings** This chapter covers what every manager should know about how to work with visual meetings and visual practitioners. Leaders set the norms for how everyone relates in meetings. There is creative room for shaping expectations and opportunities if you have a clear idea of what results you would like to achieve.

# 1. Seven Essential Tools

## *Metaphors & Models, Visual Meetings, Graphic Templates, Decision Rooms, Roadmaps, Storymaps, & Video*

Have you ever set out to learn something new as an adult, say playing a sport or a musical instrument? You probably already know something about whatever you set out to learn, or you wouldn't be attracted to it, but chances are, you didn't learn the underlying discipline or practice enough to be masterful. If you are lucky, you will find a teacher who has experience and knows how to pick just the right foundation elements upon which you can build more proficiency. It's a step-at-a-time process.

If you are young and immersed in visual media already, you'll benefit from seeing what an experienced person like myself has found that works across a broad range of organizations and leaders. You can check to make sure your foundation skills are strong.

If you are more experienced, perhaps having learned to read your own form of "sheet music" for leadership, you can look forward to broadening your repertoire by learning some of the underlying theory and practices that will allow you to improvise in different situations and different organizations.

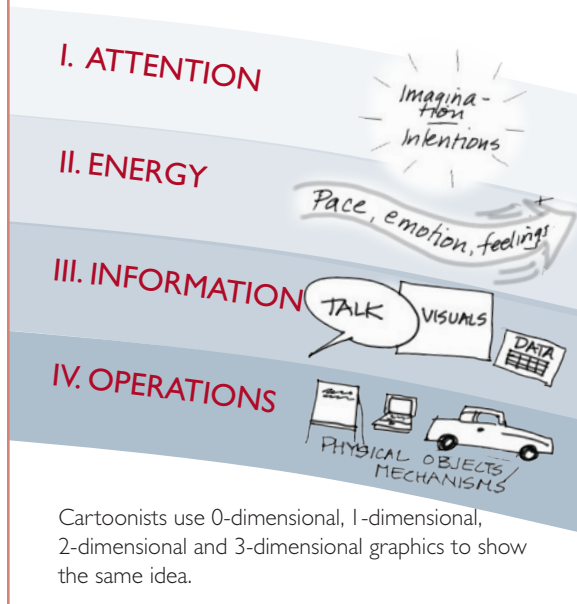
### ***Beginning with the Tried-and-True***

In music, beginning simply and building step by step with the basic elements that every musician knows makes all the difference. The goal, if you are studying jazz, is to have freedom of improvisation. But interestingly, a good teacher will start with the constraint of learning basic melodies, keys, and chords rather than sheet music with all the notes. Sheet music doesn't really teach you what the music is about, or encourage a wide range of possible variations. If you put basics first, in a short time your playing will jump to a whole new level. Visualization tools function just like the basic components of music. As with music you'll learn specific melodies (strategies and practices) that sound great even in their more basic states. This is the approach we'll take in regard



## FOUR FLOWS THINKING

The Four Flows framework is a key tool for facilitators, but it also relates to leadership. You may have noticed the band of four shades of blue that run across the opening Parts pages of this and previous books. It is a graphic way of indicating the four ways humans make sense of things. In common terms we talk about spirit, soul, mind, and body. Carl Jung identified these as intuiting, feeling, thinking, and sensing modes of knowing. Here we call them attention, energy, information, and operations. All tools in leadership and management are aimed at handling these singly or in combination.



to visual leadership. All the way along are stories that explain the “music” and exercises that will teach you the basics. If you practice them as suggested in this book, you’ll literally see the results. Because this book is written for leaders and managers, I’ve included the basics on improving your visual IQ, as well as coaching and guiding your teams to work visually so they don’t necessarily rely on you to do it all. This chapter is for orientation, and then each tool will get its own chapter in Part Three. As you begin to get the basic ideas, we will improvise around the edges and you’ll hopefully get a sense of the larger world of visualization that awaits. It’s every bit as vast as music!

### **What Is a Visual Tool?**

“Tool” is clearly a metaphor. It’s used to indicate tangible things you can do to get desired results. Every tool is a product of some intention to do something. With repeated use, a tool will evolve and become refined. A good tool will have a central use but will also be usable for things other than it was intended. For instance, a good hammer could be used to prop open a door. In this book the metaphor of *tool* indicates any distinct, learnable process or practice that can be described and repeated to get an effect, such as the Four Flows framework on this page.

When thinking through all the tools a visual leader can use, it helps to understand the repeating challenges that a leader needs to meet, in any situation, at the broadest level. From the widest possible point of view, your challenge is to focus organizational awareness, support engagement of your people, clarify insights into the right things to be doing, and build ownership in projects and initiatives. A simple Goals of Leadership model is illustrated on the next page (an improvisation on Four Flows). The seven essential tools are ones you can use to meet these goals.

Appreciate that any generalization like this is for the sake of revealing the foundational elements, not all the variations, just as in the music. As you read this chapter let your own experience resonate with the examples and work out your own adaptation of this framework.

## Goals of Leadership

Ed Friedrichs, former chief executive officer of Gensler, a very successful, large architecture firm, says, “Leaders focus on doing the right things and managers focus on doing things right. You need both in an organization, even though people often have leanings one way or the other.” This book is written for both, so keep both in mind as you look at the five goals illustrated on this page. At the most general level, leaders and managers focus on what needs to be done, with whom, in what time frames, and with what kind of quality.

FOCUSING **A**WARENESS

SUPPORTING **E**NGAGEMENT

CLARIFYING **I**NSIGHTS

BUILDING **O**WNSHIP

It all adds up to fostering as much understanding of all the right things to be doing distributed as widely as possible throughout your organization. In living systems the DNA instructions are in every cell!



## AN ASIDE ON MNEMONICS

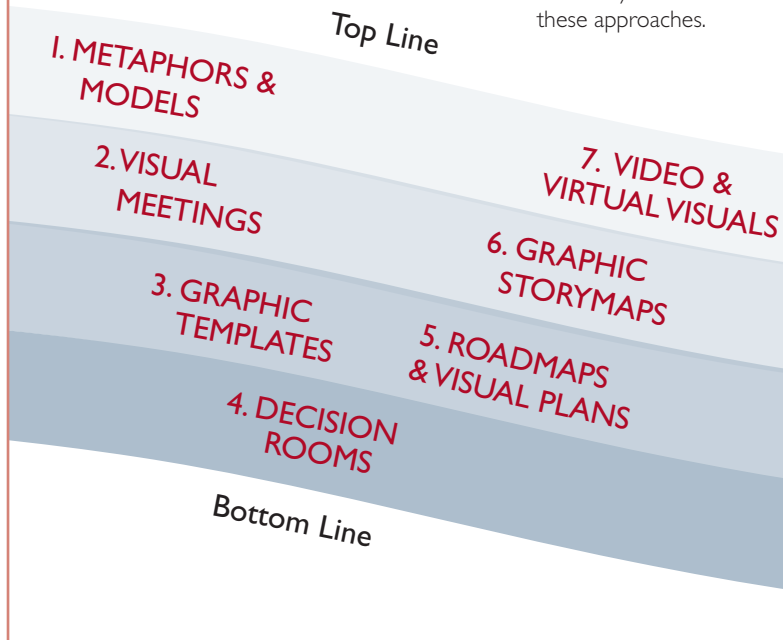
Memory experts have long understood that visualization is a key to the kind of memory stunts stage magicians demonstrate. A former White House chief of staff would, in the morning, imagine his day and all its issues and events as dishes on top of a stove in a kitchen. He would imagine which were on the front burners, which in the back, and which were on the side being prepared, laying out the whole day that way. The image helped him remember everything. Visual models such as the one below, with memorable acronyms, are ways to remember important information without having to have notes. Don't confuse them with the real world itself. Use them like lenses, looking through them to see both what fits and what doesn't in your actual situation.

**U**NDERSTANDING

## ESSENTIAL TOOLS HELP HANDLE THE FLOWS

The seven essential tools are organized in the order in which you would probably learn to deploy them. They nest into each other like chords in music. Here they are visually placed at their center of focus, but like musical chords, they can be played in many different ways.

Each tool is actually a set of tools. Part Three provides specific examples that you can put to use right away along with stories of leaders who have used them successfully. This will give you a sense of where the tools can take you if you learn to use them regularly. Because the intention of this book is to give you enough as a leader to guide your staff and consultants in helping you, these later chapters do not dwell on the technical details, but rather focus on the purpose and expected outcomes that usually attend these approaches.



## What Does It Mean to “Understand”?

You might recognize in the DNA analogy on the previous page a bias toward thinking of organizations as living systems (as distinguished from mechanical systems). In living systems the DNA contains the story of how different parts of the organism should grow and behave. If a cell in a plant finds itself underground, it knows to be a root. If it finds itself at the end of a branch, it becomes a leaf. There is no “central command” in a plant.

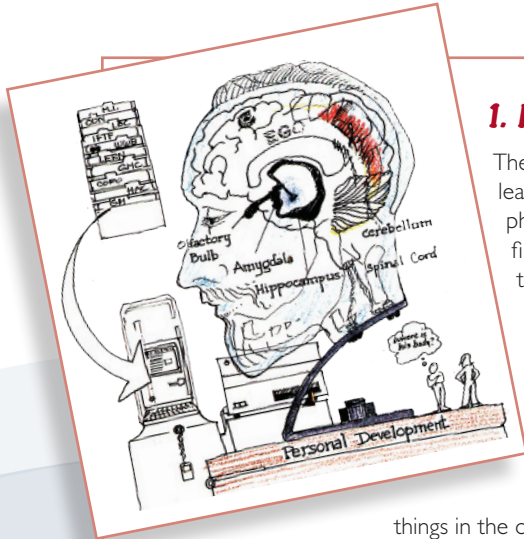
The lesson from this analogy is that when people truly know how their work relates to bigger goals and have a fully developed understanding of the way in which they should be doing their job, the organization works more effectively. Developing this general understanding about the right things to do is the primary job of leadership and key power of visual leadership.

The tools shared in this book are some of the most effective ways of creating real understanding from your direct reports and other people concerning the way the organization needs to work. Some of these tools are also about supporting doing things the right way—the manager’s job.

You will come to see that the choices of which visual tools are essential focuses on ones that invite *more* rather than less engagement and that empower *more* rather than less understanding. People need to respond to and play with new ideas to create real knowledge. Watching a slide presentation does not support that kind of learning. Working interactively with visualization does—assuming you want to foster awareness, engagement, insight, and ownership—a level of understanding that translates into real results.



# Seven Essential Tools for Visual Leaders



## 1. METAPHORS & MODELS

The first essential tool set for visual leaders consists of the visual metaphors and models that you use to filter your understanding of how things work in your organization.

If you think about it, your brain has never been outside your skull! All the images, pictures, sounds, smells, and memories have been pulled together out of raw sense data by you! They are all representations of

things in the outside world and not the world itself. We understand what we don't know by comparing it with what we do or comparing it with some model we've learned. This is metaphoric thinking. Visual metaphors are the patterns of understanding that we can visualize explicitly. Chapter 7 explores these in some depth.

### Key Questions to Ask Yourself

- Can I become aware of when I am using metaphoric thinking?
- Are the metaphors and mental models that are meaningful to me meaningful to my team and organization?
- Do I know how to link my internal ways of thinking with memorable images and stories in visible communications?
- Do any of my metaphors and mental models function like the operating system in a computer and can be widely shared?
- Will learning to visualize my central metaphors and models help me boost my visual IQ?

## 2. VISUAL MEETINGS

Visual meetings are ones in which you use visualization actively to inspire, engage, support thinking, and support enactment. It includes both things you as a leader do with visuals and also the visual support you can get from others. The most powerful thing about being interactive with visuals is you get four things right away—even if the charting isn't practiced.

### Power of Visual Meetings

**IMAGINATION:** Visuals spark new thinking.

**PARTICIPATION:** Engagement increases immediately.

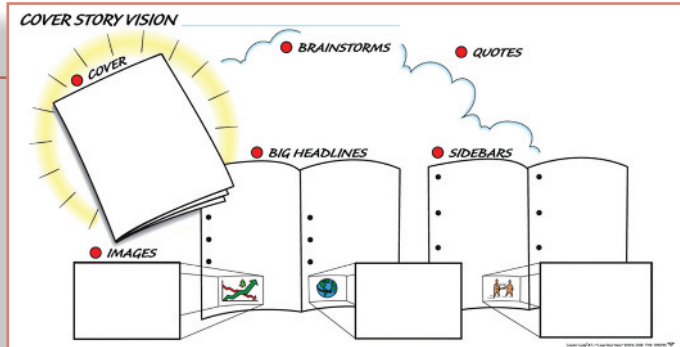
**BIG-PICTURE THINKING:** Display making is the key to systems thinking, seeing relationships, and developing aligned group understanding.

**GROUP MEMORY:** Visualizing produces a memorable product that everyone sees being created. Retention increases. Follow-through is stronger.

Chapter 8 will explain this in more detail.



## Essential Tools, continued



### 3. GRAPHIC TEMPLATES

An effective way to get visual without facilitators or consultants is to use simple graphic templates for both collecting information and having staff and others report information. The one above is a popular visioning template from The Grove called the "Cover Story Vision Graphic Guide." Many more are covered in Chapter 9.

Graphic templates have prestructured areas for information and are designed to optimize everyone being able to see important relationships.

#### Benefits of Using Graphic Templates

**INSIGHT:** Making the graphic template requires that you and your team determine the most relevant information to share.

**PANORAMA:** Templates placed around a room create a full surround of information so that everyone can see critical relationships.

**RETENTION:** Templates can be rolled up and unrolled in another room with almost no loss of memory and can stand out from other communications by being big, yet easily shared with digital photography.

### 4. DECISION ROOMS

Seeing the forest *and* the trees is essential during decision making. As a leader you need to know how to ask staff and others who are supporting you to display critical information in ways that enhance decision making. Much of this involves thinking through what needs to be compared with what. Many of the best tools are large matrixes with sticky notes.

Chapter 10 will show you how to create simple decision rooms you can operate yourself and how to stage more complex ones for larger groups. Decision room design helps enhance your use of visual meeting and graphic template tools.

Here is a mock-up of a management team decision room done in Second Life. It's modeled after The Grove's design space in the Presidio. Some organizations like Procter & Gamble have entire venues like their Gym dedicated to supporting special meetings that are highly visual.





## 5. ROADMAPS & VISUAL PLANS

Can you imagine project management without timelines and milestones? But many project management tools are too detailed for regular use in your leadership role of keeping attention on the right things and encouraging timely execution. The roadmaps and visual action plans described as an essential tool for visual leaders are high-level visualizations—essentially “freeway maps” (to continue the driving metaphor)—that allow you and the rest of your leadership to tell an aligned overview story about big projects and plans.

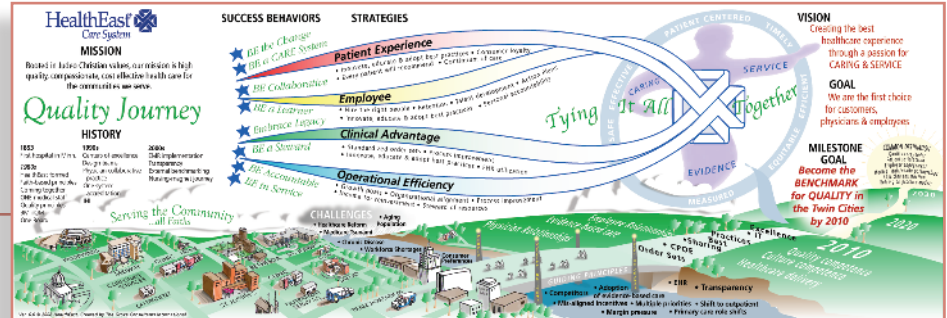
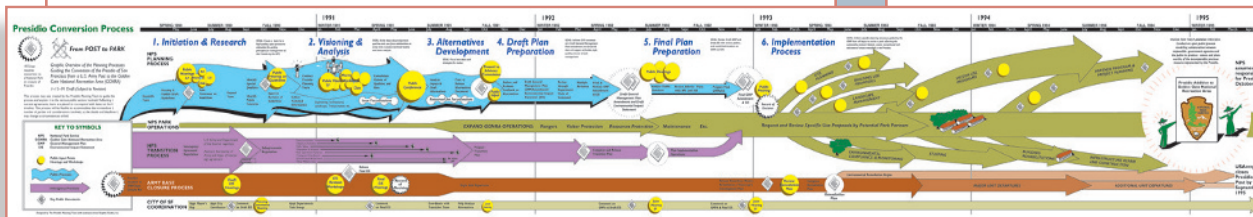
The graphic below is a roadmap the National Park Service used to orient the public to its conversion of the Presidio Army Base to a national park, now called the Presidio Trust. Chapter 11 explains how this was created and how you can get staff to create high-level roadmaps and other visual plans that will support implementation.

### Key Uses of Roadmaps

**COMMITMENT TO IMPLEMENTATION:** Get leadership to buy into implementation by having them co-create roadmaps and plans.

**PROJECT PACING:** Focus your organization on key milestones.

**STAKEHOLDER ENGAGEMENT:** Be able to explain your process easily to those not directly involved.



## 6. GRAPHIC STORYMAPS

Large murals and posters that integrate history, visions, challenges, values, critical behaviors, and other key ideas into one graphic are called “story-maps” by The Grove or murals by others. During culture change or any high-impact organizational change, these tools help people link visions and goals to the culture that people experience every day.

You generally create large murals with the help of internal or external information designers. Your role is to guide what story you need to tell and how to use the creation process to align your leadership team. The Quality Journey map is an example. The process, described in Chapter 1, was led by two internal managers who themselves were not information designers but knew who and what needed to be involved.

### Key Uses of Storymaps

**ALIGNMENT:** Use the product to align key language and goals.

**CULTURE CHANGE:** Engage everyone in understanding what behaviors need to change to reach your visions and goals.

**AUTHENTICITY:** Provide a way for you and other leaders to show up authentically and personally—and tell your story in a flexible way.

**ORGANIZATIONAL DIALOGUE:** Iterate storymaps over time to show that you are listening.

## Essential Tools, continued

### 7. VIDEO & VIRTUAL VISUALS

Video, smartphones, and tablets are changing everyone's way of working. As a leader you need to know how to use these tools efficiently, what their advantages are, and how you can make sure your teams have the correct infrastructures for visual work at a distance.

This book isn't about social media, but it will describe how the other six essential tool sets can work virtually on webinars and conferences. It will also explore how you can be a more conscious "cursor" for organizational attention. Video is increasingly a powerful way to accomplish this. There are nice, emerging options beyond very expensive, professional video productions. Chapter 13 explores this area.

#### Power of Virtual Visuals

**FOCUSING ATTENTION:** One consequence of having so much digital communication is that it makes it tougher to get through the "noise" and keep everyone's focus on the important things. New media can help if you know how.

**PERSONAL TOUCH:** Videos capture motion and emotion better than any other medium. There are ways of combining videos with the other tools.

**MOBILE MEMORY:** If your people can reference key documents in easy, visual ways, it will help them remember.



### Questions for a New Visual Leader

The beginning of this chapter compared learning to visualize with learning to play the piano. The essential tools are like the different chords that you can play. All of them use visual notes so to speak—the words, icons, and shapes of graphic language that make it work. As you continue reading keep these questions in mind:

1. How can I use visualization myself as a leader?
2. Which tools should I start with?
3. What is visual language and how does it work?
4. What are the basic rules of improvisation?
5. How can I get others to help me with visualization?

### Bring Visual Leadership to Life

As helpful as a four-color book is in showing you different examples of visual work, it does not provide an experience of what it is like having these visuals evolve and develop in real time in a co-creative process. You will have to image that all the way along. To help you, the next chapter reviews a real-life story where many of these tools were used very effectively. This should help you imagine what is possible. Another way is to do the exercises included in this book. The true power of visualizing is in the *ing*—the doing of it. *Drawing* and *diagramming* are actually ways of thinking, just as talking is a way of thinking for some. Chapter Five includes specific exercises you can do to experience this important aspect of visualization yourself.