VISUAL TEAMS
GRAPHIC TOOLS FOR COMMITMENT, INNOVATION, & HIGH PERFORMANCE

CREATE

I’m ready to log in, are you there?

SUSTAIN

David Sibbet

Comprehensive Team Performance Kit

Gameplan

Stages / Tasks

Success Factors

Challenges

Visual Meetings
VISUAL TEAMS
GRAPHIC TOOLS FOR COMMITMENT, INNOVATION, & HIGH PERFORMANCE

THIS FIELD IS MOVING FAST! LET'S GO!
I'M READY TO LOG IN, ARE YOU THERE?

VISUAL TEAMS

GRAPHIC TOOLS FOR COMMITMENT, INNOVATION, & HIGH PERFORMANCE

CREATE

SUSTAIN

DAVID SIBBET
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.
Contents

Introduction

Imagining Better Results for Teams xi

I. What Is a Visual Team?

Using Graphics Across the Whole Workflow 1

1. Working Like Designers / Why Visual Teams Get Results 3

2. Why Be a Visual Team? / The Case for Collaboration 15

3. A Graphic User Interface for Teams / The Drexler/Sibbet Team Performance Model 29

II. Leading Visual Teams

Seeing the BIG Picture 55

4. So You’ve Just Been Promoted / Understanding Team Leadership 57


6. Supporting Innovation / Providing Visual Tools 83
III. Visual Team Startup  
Creating Trust, Focus, & Commitment 93

7. Visualizing Purpose / Orienting to Your Mission 95
8. Seeing Yourself As a Team / Developing Trust 107
9. Clarifying Goals / Using the Graphic Gameplan 117
10. Consensus or Command? / Deciding Commitments 131

IV. Sustaining Results  
Innovating for High Performance 149

12. Visualizing & Innovating / Understanding High Performance 159
13. Assessments, Dialogues, & Sharing Rallies / The Importance of Learning & Renewal 171

V. Growing a Visual Team Culture  
Thinking BIG About Opportunities 183

15. Developing Visual Team Skills / Learning Tips & Tools 193

VI. New Technology Tools
A Revolution in Visual Collaboration 219
17. Visual Tools Come of Age / Experiencing High Performance at the Institute for the Future 221
18. Graphics for Distributed Teams / Web & Teleconferences 231
19. Team Rooms & the Net / Physical Places or Virtual Spaces? 241
20. Mobile Technology / Reshaping Tomorrow’s Teams 249

VII. Links, Tools, & Other Resources 263
21. Websites & Bibliography 265
   Appendix 273
      Jack R. Gibb’s Original Research 273
      Summary of Arthur M. Young’s Theory of Process 274
   Index 277
IS BIRGIT DIALED IN SO SHE CAN SEE THIS?
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. Increasingly 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.
whenever I 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 RR 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.

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 Idea 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 in 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.

**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.
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 increasingly 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” cultures work.

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

---

**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 at the core of the design process suggests a “third way.”

(*Change by Design*, 4)
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.

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 I 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, informa-
tion 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.

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 big tasks of a team leader, and the inner work required to be an excellent one. It frames the challenge of 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 an 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.

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. They are the foundation upon which later stages depend.
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 graphic 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 resources 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 all seems to be heading.

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 communications 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)
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.

**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 to 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 Users 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.

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

**Visual Meetings for Engagement**

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 a 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 more common ideographs and pictographs people use in graphic recording.

Chapters also detail how sticky notes, dot voting, group drawing, templates, and other strategies let people get their hands directly on information. I make the argument that having groups interact with partially completed frameworks and displays greatly increases involvement. I reflect on presentation software such as PowerPoint. While appreciating the extent to which it is an
excellent, individual, prototyping environment, it many times results in a pushy kind of presenta-
tion that all too often isn’t very involving. (If you want to learn to use PowerPoint well read Nancy
Duarte’s book, Slideology, and her companion book, Resonance.) In Visual Meetings the chapters on
sticky notes go into great detail on how to use these extremely flexible tools.

**Visual Meetings for Thinking Together**

In the third section of *Visual Meetings* I cover the Group Graphics Keyboard, a
framework for thinking about seven archetypal types of displays. This Keyboard is an
application of the Theory of Process to visual work with groups, and looks at displays as a dual
process of display creating and display perceiving. The simpler visualization processes become
foundations for the more complex ones, just like in natural systems. There are detailed explana-
tions of each Group Graphic format and examples. I follow this with a description of The Grove’s
Visual Planning templates (called Graphic Guides) with lots of examples. I will be describing the
ones that are especially relevant for teams in this book in greater detail.

The chapters on visual thinking argue that all systems thinking is based on display making—dis-
tinguishing the parts so you can look at relationships. I cover the most common types such as
Mind Mapping, causal loop diagrams, total quality management charts, and the like.

**Visual Meetings for Enactment**

The final step in the learning cycle is to take ideas to action. The chapters in this
part of *Visual Meetings* show how action plans, road maps, and Grove Storymaps
support getting results from meetings. These tools are also critical ones for teams
and will be treated in much more depth in this book. *Visual Meetings* describes how involv-
ing leaders in creating their own visual communications builds buy-in and ownership.

---

**WORDS FOR TEAMS**

At the conclusion of their internship with The Grove, Daniel Cheung and Victoria Bensen
gave a presentation to staff on what they found about tools for teams.’’The word teams seems
to be used to cover the entire work of people in organizations,’’ they said. ‘’Some even said the
word is so overused that it doesn’t communicate anymore.” They reported that one person said
that “collaborative work” is becoming a more common designation. Another distinguished be-
tween “workgroups” and “teams.” I began writing down all the words I’d heard used for groups that
need to cooperate to get results. Here is my list.

What’s yours?

- Team
- Workgroup
- Task group
- Task force
- Partnership
- Duo
- Trio
- Foursome
- Party
- Band
- Family
- Council
- Committee
- Crew

- Function
- Unit
- Squad
- Gang
- Posse
- Pod
- Cell
- Troop
- Troupe
- Cohort
- Force
- Camp
- Community of practice
The final chapters look at how visual meetings are being amplified by new technology. I touch on tablets, web conferences, object-oriented programming, and virtual worlds.

*Visual Meetings* also has a good resource section for anyone wanting to put these ideas into practice.

**Visual Meetings and Visual Teams**

A visual team, in one sense, is any team that is adept at visual meetings! However, in actual practice, visualization works well beyond meetings to support the in-between communications, reporting out and evaluating results as well. Visuals provide a common language for teamwork across the entire spread of the organization. Katzenbach and Smith, the McKinsey & Company consultants who wrote the widely respected book, *The Wisdom of Teams*, point out that one of their “uncommon findings” was that “many of the highest performing teams . . . never actually thought of themselves as a team until we introduced the topic” (Katzenbach 1993, page 4). I think the same is true of visual teams.

You could think of this book as the summing up of a professional lifetime of developing strategies for collaborative work. Whether or not you think of yourself as a team, if you are interested in how people can work better together you will get a bushel full of good ideas. In a time of networks, multiple team assignments, virtual work, and even virtual organizations, the common idea about what a team is and isn’t is evolving rapidly. I hope this book helps build your confidence so that you can become part of a bounty of innovation in how people can work more effectively together.
Acknowledgments

I would love to repeat all the acknowledgments I made in *Visual Meetings* about all the people at The Grove Consultants International, the International Forum of Visual Practitioners, the Organizational Development Network, the Pathwalkers, the Thought Leader Gathering, and Coro who have been so helpful in shaping my career as a visual practitioner, but the list is long. Here, I want to give special thanks to those who have supported my development as an organization consultant and team developer.

Allan Drexler was my mentor and teacher for most of the 1980s and into the 1990s. Our companies are still partnering successfully in the shared ownership of the Drexler/Sibbet Team Performance Model. We cocreated the National Training Labs five-day workshop on Creating and Sustaining High Performance Teams—conducted continuously since the early 1980s by Allan and Russ Forrester, who joined our training team in the early 1980s. Russ and Allan have evolved an assessment business built around the TPM, and authored the Forrester/Drexler Team Performance Indicator, a self-scoring assessment, and its companion field book. They live on the East Coast of the United States and have teamed on many projects.

It was my good fortune to meet Arthur M. Young, the developer of the Theory of Process, when he first published it in 1976. I was part of his Institute for the Study of Consciousness from 1976 through the early 1980s and continue a relationship with Young’s primary students. The TPM is one of the most successful applications of this theory to organizations, and was recognized as such by the Anodos Foundation, which is carrying on Young’s work. A colleague, Jack Saloma, now deceased, introduced me to Young and was an intellectual partner in developing some of The Grove’s organizational applications. Frank Barr and Michael Buchele also contributed, as we wrestled through their application of the theory to bioprocess.
My experiences teaming with the Institute for the Future has been integral to understanding the TPM applied to new technologies and supported by tools for visualization. Thanks to Bob Johansen, distinguished fellow at IFTF, as the leader of our groupware team. We were joined by Paul Saffo, Andrea Saveri, Alexia Martin, Robert Mittman, and Stephanie Schacter from IFTF. Tomi Nagai-Rothe, Suzyn Benson, and Mary O’Hara-Devereaux participated from The Grove. Mary O’Hara-Devereaux came to The Grove from collaborating on a project at the University of Hawaii’s Medex program. With her help we applied the TPM to training nurses in Kenya and Costa Rica. Later we collaborated on writing the book Global Work. During that same time I was working with the training team at Mars, Inc. (led by Martin Prentice) to design a worldwide facilitation training centrally focused on the TPM. This team was instrumental in teaching us how to train with the TPM cross culturally. Albert Gibson, Mary Jane Eckart, Eileen Matthews, and Joan Scarrott all deserve special thanks. Eileen and Joan became masterful graphic facilitators in the process. Recently Mars supported a Russian translation of our Team Leader’s Guide.

Joan McIntosh deserves special thanks. As The Grove’s director of marketing during the early 1990s, she co-developed with me an application of Team Performance at 3M, and became so extensively involved that she ended up moving to the Twin Cities, where 3M is located. She has been a steady advisor and friend. As founder of the Change Agent’s Café, Joan made it possible for a network of us to work with these ideas for nearly 20 years. I owe special thanks to Lenny Lind, Sandra Florstedt, Meryem LeSaget, Jim Ewing, and John O’Connell, an early pioneer in new games. Meryem is a consultant and professional writer about new management ideas who included the TPM in her French book, Manager Intuitif. She has become a student of the Theory of Process and its other applications. Another Grove partner, Vaughn Strandgaard, led in bringing the TPS to Denmark and Europe. Jonas Kjellstrand and Roy Bartilson helped in bringing the system to Sweden.
The TPS as a system would not have developed without amazing client-partners and the help of my longtime colleague at The Grove, Ed Claassen, who worked with me on many of the client projects. At Agilent Technologies, our longtime partners Christine Landon, Leslie Camino-Markowitz, and Teresa Roche facilitated the TPS being included in a new first-line manager’s training program in the late 1990s. Ed worked with myself and Bobby Pardini, and Linda Castillo at Agilent, in creating the first Team Leader Guide. Tony Jimenez at Chevron worked closely with Ed to develop a self-teaching team performance module for their manager trainings. Wendy Witterschien at Becton, Dickinson and Company worked with Bobby Pardini at The Grove to adapt these materials to a flash-based, self-learning program available system-wide in that company. Kathy O’Connell and Kathryn Santana Goldman were codevelopers at Genentech/Roche of a team refresher application of the TPM. Nancy Stern brought in Strategic Visioning templates. Jennifer Clonmell had the TPM translated into five languages for use at Citicorp. At Nike, Inc., Hannah Greenfeld, Steve Bence, Jigna Desai, and Nate James were instrumental in testing The Grove’s new Team Performance On-Line Survey and contributing to a greater understanding of the integration of the TPM and other team development models. Most recently, W. L. Gore supported worldwide team training. Ed and I traveled to Germany, New Jersey, Arizona, and China, learning a great deal about how widely practices vary within a common set of archetypal challenges. As a colleague, Ed’s intellectual partnership has been invaluable.

I also owe a lot to those clients who have championed visual meetings applied to their teams. Thanks to Susan Copple and Jim Lyons of HP, who created an opportunity to work with the BLAST team. Thanks to Joel Birnbaum, former head of HP Labs, and Barbara Wäugh and Srinivas Sukimar. John Schiavo, CEO of Otis Spunkmeyer, and his team have been champions, including Ahmad Hamade, Steve Ricks, and Robyn Meltzer in particular. Thanks to Scott Kriens, former CEO of Juniper, who sponsored ambitious applications of visual meetings, and
Joceyn Kung, the consultant who introduced us. I learned about design organizations working with Bryce Pearsall and Dale Hallock, leaders of the DLR Group, and Jon Petit, Griff Davenport, and Steve McKay, DLRG partners with whom I’ve had many discussions about how design teams work. Thanks to Chris McGoff at The Clearing for collaborating on bringing this kind of work to government. My work with Tom Wujec and Autodesk have added immeasurably to my understanding of the role of design. In that regard I also owe thanks to Dave Gray of XPlane (now Dachis Group), Kristina Woolsey at the Exploratorium, Luke Hohmann of Innovation Games, and Bob Horn of MacroVU.

This book would not have been possible without The Grove team. Laurie Durnell, our director of consulting, and Tomi Nagai-Rothe, a senior consultant, teach the TPS and adapt its tools to ever widening groups. Donna Lafayette manages our team performance workshops. Tiffany Forner, our art director, and Bobby Pardini, director of design services, have jumped in repeatedly. Rachel Smith, director of The Grove’s digital facilitation services, helped on the chapters on the new technology. Anne Merkelson and Julia Sibbet helped with insights into social media and marketing. Thom Sibbet, director of client services, has been a close link to our team performance customers. Our customer support team—Noel Snow, Andrew Underwood, and Ed Palmer (our IT manager)—has provided very practical feedback about how clients use the tools. Very little of my work life would be possible without the support of The Grove’s chief administration officer and my assistant, Megan Hinchliffe. I also want to thank Daniel Chueng and Victoria Benson, the Coro Fellows who interned with The Grove and helped develop the bibliography. A special thanks goes to the John Wiley & Sons team—Richard Narramore, my editor, Deborah Shindlar, senior production editor, and Lydia Dimitriadis, editorial assistant.

A final note of thanks to my wife, Susan, a poetry teacher and writer herself. We share our San Francisco studio. Her unstinting support of my writing makes it a joy to undertake.
I: What Is a Visual Team?

Using Graphics Across the Whole Workflow
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 LaserJet 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.