

# Visual Templates

for facilitation



Questions? Suggestions?  
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 With support and inspiration from Sophia Liang

## Going In

- Know the outcome of the activity
- Know the themes of the activity
- Know how much time you have for the activity and how it fits into the larger agenda
- Know the room and the participants

BEGIN WITH THE END IN MIND

SHAPES HAVE MEANING

TIME EQUALS SPACE

FORM FOLLOWS FLOW

LOGICAL PROGRESSION

## 1. Container Selection

instruction data fact step

sign indicator milestone metric

uncertainty doubt challenge

vision inspiration-insight idea

driver factor flow step

quote so what takeaway statement

list

big idea takeaway theme

success factors values attributes

## 2. Layout Selection

## 3. Icons Build the Metaphor

## 4. Thumbnail Sketches

## 5. Facilitation Plan

- Individuals: tabletop chart
- Completion in pairs: tabletop chart
- Tables/groups/breakouts: tabletop or wall-size
- Plenary/large group: wall-size chart

### Harvesting:

- None: personal reflection, journaling, after actions
- Flipchart (highlights)
- Wall-size chart: scribe or stickies
- Popcorn sharing
- Serial share
- Clustering
- Constructive listening

TRY IT BEFORE YOU BUY IT

## 6. Testing and Feedback

- Get unbiased feedback: find missing refrigerators
- "I Like, I Wish, What If?"
- Take on a beginner's mind: avoid endowment bias
- Adjust durations, content, and instructions
- Practice, practice, practice!

## 7. Production and Printing

Levels of information: Essential elements:

- Glance** • Title • Date
- SCAN** • Logo • Contact information
- Read

**Color:** use sparingly: color can compete with content. Use midtones or pastels. Avoid red text.



- 11"x17" (tabloid) for individuals, pairs, and small groups

- Plotter & posters for plenary
- Hand-draw small & photocopy
- Hand-draw large & photograph
- Powerpoint with no "chart junk"
- Adobe Illustrator
- Combinations of all of the above!

GO WITH WHAT YOU KNOW