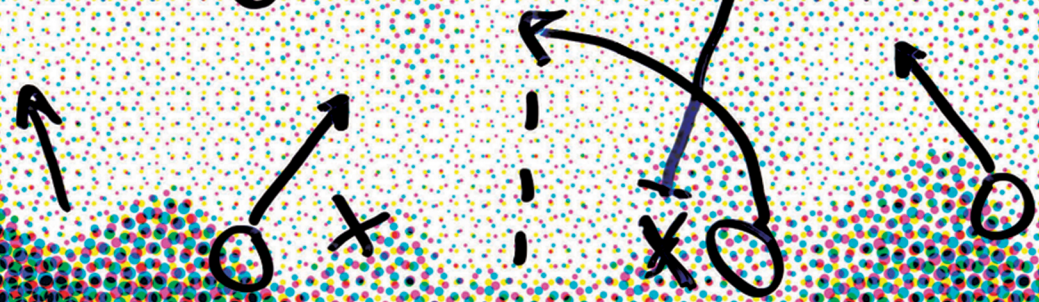




Stories That Move Mountains

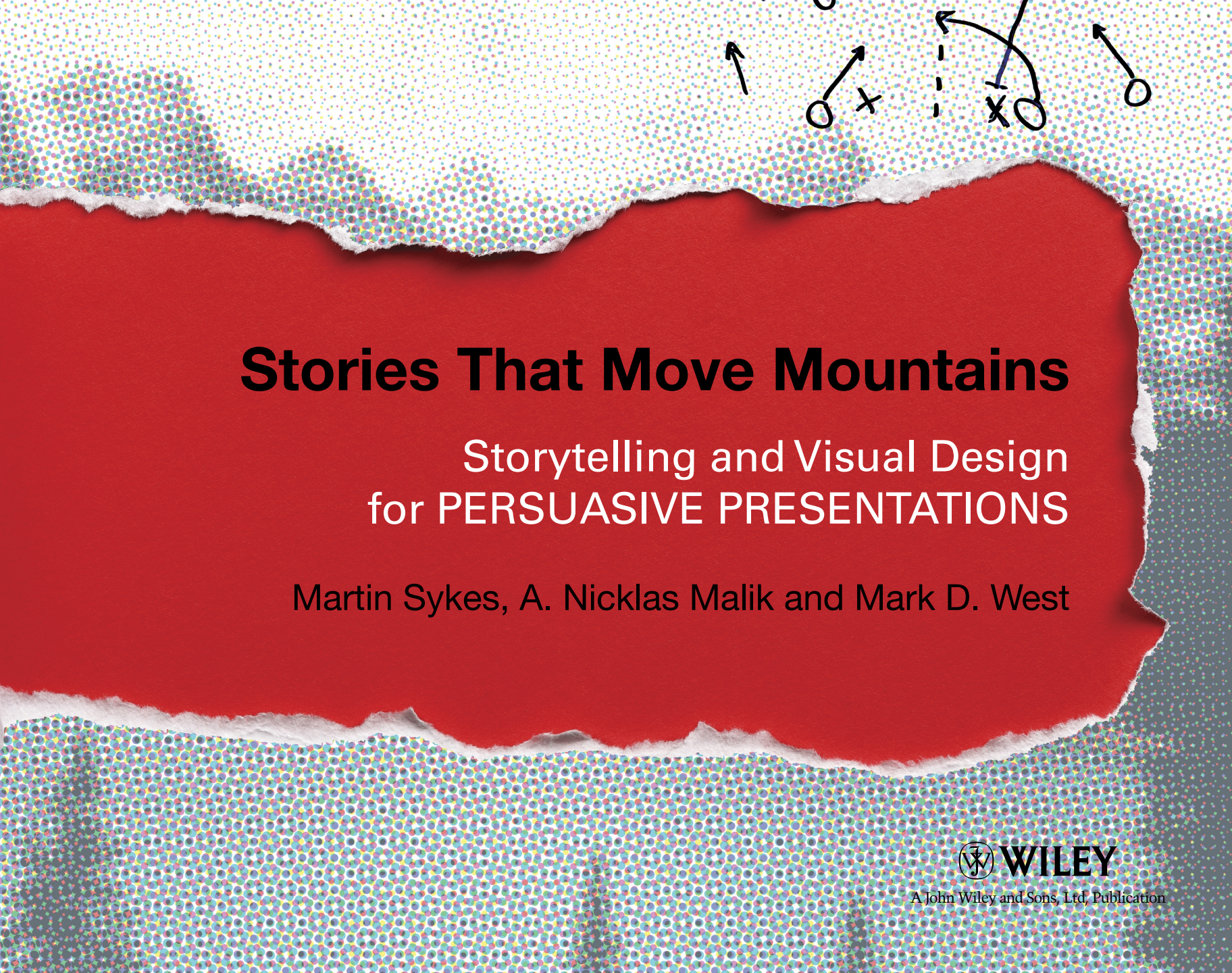
Storytelling and Visual Design
for PERSUASIVE PRESENTATIONS

Martin Sykes, A. Nicklas Malik and Mark D. West



A horizontal banner made of red paper with a torn, deckled edge. The paper is set against a plain white background. The text "Stories That Move Mountains" is printed in a bold, white, sans-serif font, centered on the red banner.

Stories That Move Mountains



Stories That Move Mountains

Storytelling and Visual Design
for PERSUASIVE PRESENTATIONS

Martin Sykes, A. Nicklas Malik and Mark D. West

 **WILEY**

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We are lonesome animals. We spend all our life trying to be less lonesome. One of our ancient methods is to tell a story begging the listener to say — and to feel — “Yes, that’s the way it is, or at least that’s the way I feel it. You’re not as alone as you thought.”

—John Steinbeck

Storytelling is the most powerful way to put ideas into the world today.

—Robert McKee

There have been great societies that did not use the wheel, but there have been no societies that did not tell stories.

—Ursula K. LeGuin

The most effective way to improve a presentation is to get better content

—Edward Tufte

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Much of what we include in this book has been known and written about for the last 50 years, with some parts going all the way back to Aristotle. We have tried to bring all that knowledge, insight and wisdom together into an actionable approach, but this would not have been possible without a lot of input, guidance and support from many people.

We would like to thank the people that directly helped with the creation of this book, those who have been involved in the evolution of the approach over the last 12 years, whether they knew it or not, and those who trod this path before us from whom we have been able to learn.

Thinking about writing a book and actually doing it are worlds apart. A very big thank you has to go to the team at John Wiley & Sons for making our vision a reality, and especially to our editor Sara Shlaer. Sally Tickner and David Stewart also deserve a mention for helping to build a book proposal that would land a publishing deal.

The look and feel of the book was as important to us as the content. We wanted it to be interesting and memorable, and without Mark as a co-author much of this would not have been possible. Mark specifically wants to acknowledge Farouk Seif, Faculty Emeritus at Antioch University Seattle, for fuelling an early addiction to infographics and the “wholistic” systems view of complex problem solving, and Erik Knutson, CEO of Design Laboratory, Inc, for the continued mentoring, the priceless meetings, and recognizing Mark’s true potential—“how I define ‘amazing’ is all because of you.”

Thank You

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About the Authors



Martin

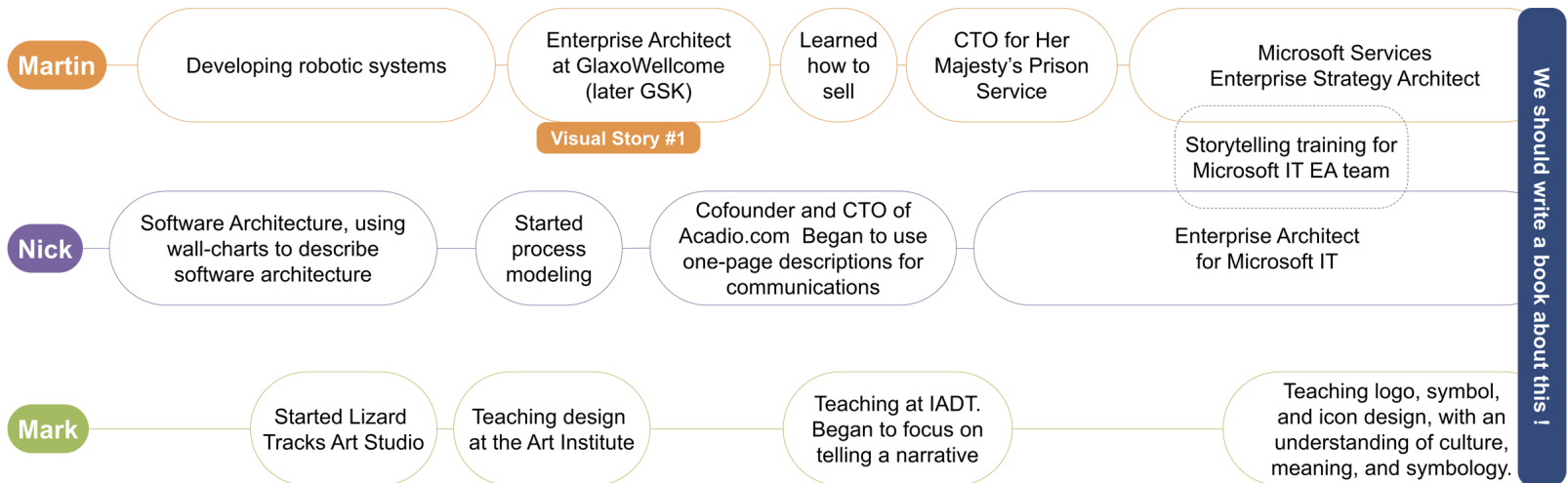
Martin Sykes started writing software 31 years ago and has spent the last 24 years working in IT organizations in the public and private sector. Since 1999 he has focused on IT Strategy and Enterprise Architecture. While developing the process and templates for visual storytelling he has worked in organizations from GlaxoSmithKline to Her Majesty's Prison Service to Microsoft, on projects from product lifecycle management to offender management systems. He has personally seen the difference a visual story can make in gaining commitment and has trained many people in the related techniques. After joining

Microsoft Services in 2006 Martin began to develop many of the methods and practices now used by Microsoft Enterprise Architects around the world.

Martin lives near Cambridge in the UK with his wife Jules, cats Solo and Tom, and an ever increasing collection of robots.

Martin is an amazing speaker and storyteller. Like anyone who has practiced his art, Martin makes storytelling look easy, but don't fool yourself. He has worked harder to understand the underlying methods and mechanisms of communication than anyone I know. He's a pretty good photographer as well, and this book has some of his photos scattered throughout. I consider myself both fortunate and blessed to know him and work with him on this grand effort.

—Nick





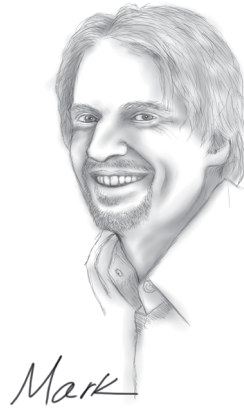
Nick

A. Nicklas Malik is a leader in the Enterprise Architecture community at Microsoft, a role that is all about making change happen. Most people don't understand the role of the Enterprise Architect, so when Nick met Martin and learned about his remarkable approach to storytelling, he realized the opportunity was right in front of him to leverage these ideas. Some of the visual stories Nick has developed have been used to build support for consistent governance, approaches to design, and plans for building

a completely integrated approach to complex business problems. In addition to being a 32-year veteran of high tech, Nick is an amateur actor and vocalist, and a full-time father to Maxwell, Andrew, and Katrina. He loves to take nature walks, breathe fresh air, read well-written stories, and hold hands with his sweetheart for the past 22 years, Marina.

*One of the things I love most about Nick is his laughter. It's a real joy to know I am inspired to say whatever it takes to get a laugh — but even more inspiring to know I design for that same effect. Although this is sometimes a dangerous approach, I find his jovial attitude **energizing** and supportive — to this day I still don't fully understand his role within Microsoft, but hopefully they know they're lucky to have him!*

—Mark



Mark

Mark D. West has a background in art, design, music, education, and training. He started working for Microsoft in 1997, executing graphic design and production solutions for MSN as an independent vendor. After many other contracts and companies, he found himself working on presentation design and data visualization for the Microsoft Services Enterprise Strategy team in 2010, where he ran into Martin. Mark has an M.A. in Whole Systems Design and ten years of experience directing art, teaching, advising, training, and developing curriculum for design

programs at five different colleges. He has been awarded Distinguished Educator of the Year at International Academy of Design and technology (IADT)-Seattle and appointed to the Professional Advisory Committee for the Art Institute of Seattle.

Currently, he's engaged in training projects with Microsoft retail stores, helping to create the stories and experiences we wish to share for store customers. Around the time of the publishing of this book, he's enjoying his one-year wedding anniversary—YAY! Mark is also obsessed with ways to get on board with the latest charting rock band, but if that doesn't work out, he's going to solidify plans for illustrating a children's book.

Mark has a very understated and relaxed manner, which makes it all the more amazing when you see his design work and his ability to teach others how to do it. He's also able to inject humor and fun into the work to keep everyone interested.

—Martin

To my loving wife, Jules, for her support and patience during the development of this book.

To my parents, John and Janice, who gave me my first computer in 1982. They had no idea what it could do or where the journey would take me as a result.

—*Martin*

To my wife Marina, for her patience and steadfast love,

To my son Max, my son Andy, and my daughter Katrina, for their enthusiasm, joy, and inspiration.

And to my parents who have always amazed and inspired me with art, infused me with reason, and taught me with love.

—*Nick*

To Chrissy, my patient wife... for her support and tolerance for all the Sunday morning author conference calls after busy Saturday nights, and believing and recognizing my potential to make this book happen.

To my parents Joan and Hubert: for cultivating my creative outlets from an early age. Enduring my drumming from the basement for hours at a time was above and beyond anything I would expect of anyone—in retrospect.

—*Mark*



I had been developing and using the ideas in this book for five years before I presented them for the first time in public at the seventh annual Enterprise Architecture Europe Conference in 2006. Between that first public showing and the writing of this book, the content has been refined, tested, and used to train hundreds of Microsoft employees and people in other major organizations around the world.

In 2010, Nick offered to work on the book with me, and we soon invited Mark to join us. Even at that point, this project almost didn't happen. As we were conducting the market research, I found enough books with similar content that I almost gave up. However, after talking with people who had participated in my training courses I realized we had two very strong reasons to write a book. Many books had a narrow focus on a particular skill set, with very few covering the breadth of techniques, or explaining how to bring all of these skills together in a repeatable process. Hardly any of the books focused on the practical aspect, with worked examples to show how to apply the concepts. Our aim is to keep the theory to a minimum and focus on the practical. Eventually you may need those other books that dive deeper into the details and the theory, but when the presentation needs doing and your career is on the line, we believed a “get the job done” guide was needed.

Stories That Move Mountains is focused on one of the most common reasons for presentations — the need to gain commitment from other people for a change, proposal, or decision. Many presentations and communications are made each day simply to educate the audience, but I know from many years of trying to influence people that when you want the audience to make a decision, or want to change their behavior, you have to work a lot harder.

This is a handbook for people who are ready to go beyond the usual approach of presentation slides covered in bullet lists. This book is about content, focusing on just what the audience needs to understand. It's about understanding your audience, and the reasons why they will be willing to act on your proposal. It's about using stories to wrap your message in a way that has influence and impact. And it's about creating your content in the right format for the situation.

From senior managers tasked with making decisions to call center operators to the followers of 24-hour news shows, people today are constantly overwhelmed with the data and information pushed at them. More and more, we see that people do not have the time to read long text documents and are bored with typical presentations. At the same time, we see too many projects fail because the people involved have not committed to the changes the project requires. In this book, we introduce you to a process that focuses your message onto a single page, and from there build out to the appropriate mix of formats to deliver a compelling visual story.

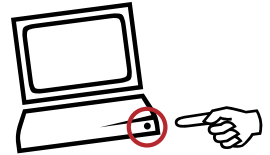
I know this process has worked for many hundreds of people already, and from all three authors we hope you will find it useful and interesting. If you have any questions, feedback, or examples you would like to share with us we can be contacted through the book website or on our Facebook page.

—Martin Sykes

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The Power of Stories

The Art of Communication Needs a System **Reset**



1

Which is worse: repeatedly performing a flawed process, learning about it without question, or teaching it to others?

In business, and in life, we often repeat the same pattern: We learn flawed ideas, we use them, and then we teach them to others. Usually, this is because our underlying assumptions are incorrect, and since we don't like to question our assumptions, we often repeat our mistakes.

What follows is a true story showing how a good idea can be killed by poor communication and how tenaciously people can fight to reject a good idea.

In the nineteenth century, free or low-cost maternity clinics were set up across Europe to reduce infanticide and improve the practice of medicine. This greatly appealed to poor women. In one unique institution, the Vienna General Hospital, there were not one but two clinics for childbirth. Clinic One used doctors, and Clinic Two used midwives. In the midwife clinic, on average, about four percent of mothers died during labor. In the physician's clinic, the number was at least *twice as high*, and in some years, the death rate topped ten percent. Something was amiss.

Dr. Ignaz Semmelweis, a young resident at the time, compared the practices at the two clinics and, in 1847, suggested a reason for the difference between the two. The doctors in Clinic One were studying anatomy by dissecting decaying corpses and then walking directly into labor clinics to deliver babies *without washing their hands*. The midwives in Clinic Two were not. He theorized that something was being carried on the hands of the doctors. To prove his theory, this young doctor introduced antiseptic hand washing in Clinic One. The results: Infection rates dropped dramatically. Death rates dropped dramatically.

Semmelweis's colleagues started to share his results with the medical community, hoping to save thousands of lives. After all, this was great news! The medical community responded by ridiculing his ideas or misunderstanding him. After all, it couldn't be the *doctors* who were making the women sick!

Historians have concluded that Semmelweis thought his ideas would be obvious to others and they would catch on quickly. Because of this Semmelweis didn't write a paper on his ideas until 1858 and didn't write the book on his findings until 1861. Competing papers and textbooks dismissed his ideas. Bad practices were propagated, and good ideas were dismissed. It was simply inconceivable that doctors were making healthy people sick.

After his book earned bad reviews in 1861, he wrote harsh letters to medical leaders around Europe, infuriating his peers. In 1865, two of his peers conspired to commit

him to a mental institution, where he was beaten and then, ironically, died of an infection within two weeks of arriving at the institution. After his death, his replacement as the head of the obstetric hospital of Pest, Hungary eliminated hand washing. Death rates climbed tenfold. No one protested.

Practicing physicians continued to resist the idea that doctors should wash their hands before performing a procedure *for another 75 years!* The evidence was there, yet change was slow to come. What was missing?

Some scholars have suggested that Semmelweis was a good scientist, but a poor communicator. Perhaps if Semmelweis had used a simple and clear way to communicate the effectiveness of hand washing, many lives could have been saved.



All new ideas, large or small, meet with some level of resistance, especially if the new idea requires new *behavior*. If we want to change the way people behave, remember that comfortable ideas will not yield easily, even to evidence and authority. In order to change hearts and minds, we need to focus on enhancing how we communicate. We need to be clear, convincing, and accurate.

Do we really believe that minds can be changed with a stream of bullets in a presentation slide deck? If the existing methods of communication aren't working very well, then we need to work out what is missing.

Visual

Over the years we have shared the content of this book with hundreds of people. Al Noel, a principal consultant at Microsoft, had this to say about changing how you approach presentations.

You must free your mind! No more boring lists of bullet points! That stuff does not work. You have to take a much different approach. People absorb stories visually all the time with all our modern communications technology.

Many years ago when I was in the Army, I was assigned to the 101st Airborne Division. At that time, the idea of an Air Assault division that used helicopters extensively was a new idea some people did not always get. One picture in the presentation regarding the division's capability summed it all up. It was a picture of a helicopter flying over difficult terrain.

Any infantry man can just look at that picture and get the message. It is about taking a completely different approach over the obstacle and moving on. No more figuring out better ways to cross the obstacle quicker, faster, and safer; you must take a completely different approach to the problem. You only have to cross something like this once in your life as an infantryman to get the idea and appreciate it. It's the same with the visual approach to creating and telling stories.

—Al Noel

Stories

In their book *Made to Stick*, Chip and Dan Heath talk about an annual class they run at Stanford University. The students are asked to deliver a one-minute persuasive speech to their peers. All the students are provided with the same data. Half of the students must argue for one point of view, the other half for the opposite point of view.

As you might imagine with Stanford students, these are typically good-quality presentations that clearly impart data and arguments. After the presentations, the audience is distracted for a few minutes with a comedy video and then asked to write the key points from each speech they heard, working from memory because they don't have notes to refer to.

The students are surprised at how little they can remember. It's not as though they had a lot to remember, just eight one-minute speeches. These are well-educated people, being presented to by some of the brightest students on the planet. Although only one in ten students will use the presentation to tell a story, leverage emotion, or really focus on a few key messages, the evidence shows that sixty-three percent of the audience can remember facts from the story-telling presentations, compared with only five percent from the rest. This evidence was one of the tipping points for me. The use of stories can make your ideas stick in the minds of your audience.

Should We Blame the Tools?

We make presentations every day. This is especially true in professional settings, where we present ideas, agreements, and updates to peers, superiors, customers, partners, and stakeholders. We even make presentations at home and in our communities. Yet not all presentations are equal. Sometimes, a presentation leads to decisions, actions, commitments, and change. However, far too often, a presentation fails to produce any effect whatsoever. The audience may have learned something, but their actions don't change. So, the question is, was their time well spent?

If, like us, you've sat wearily through boring presentations, maybe you've thought or heard others say, "That's an hour I'll never get back," or "Did we make any progress at all in there?"

But should we blame the tools? After all, Microsoft PowerPoint has become ubiquitous in business and government settings. Speakers at major conferences are expected to use PowerPoint to deliver their presentations. Military commanders use PowerPoint to provide status updates to their superior officers, and teachers at all levels, from grade school through graduate school, use PowerPoint to deliver class lectures. It's clear that PowerPoint has been widely embraced as the de facto mechanism for education, information sharing, and idea sharing.

We don't think the fault lies with the tools. For one thing, PowerPoint and other similar presentation packages are relatively new tools. Poor communication has been happening for a long time. In fact, most of our visual stories have been created by using PowerPoint as a simple design tool.

Finding the Right Tool for the Job

As a tool for convincing people of big ideas, a typical business presentation built from a template of bulleted lists fails in so many ways.

The reasons are plentiful. Different people start with different assumptions, learn in different ways, and need different information to make decisions. Some people are detail-oriented and some like the big picture. Some need a logical argument; others want to understand the impact on people and processes. You cannot provide all possible permutations of the information needed, yet make it easy to navigate and understand with a standard bullet list template. Yet people try, and as a result, members of the audience either become confused or angry about your presentation, or they ignore it. What could be *less* effective than that?

If the standard presentation template approach isn't an effective way to convince people, why do we use it? Einstein said, "Insanity is doing the same thing, over and over again, but expecting different results." And that applies here. Most PowerPoint presentations created to convince people of a new idea are about as effective as using a hammer and chisel to slice bread. It will work, sometimes, but not very often and not very well.

This is a reboot. We are starting over, and questioning the basic idea of the presentation itself.

This book is about how to effectively communicate that a change needs to happen so people will be motivated to take action. The approach we will introduce you to in the following chapters produces a clear communication that we call a **visual story**.

visual story
visual story

Visual story (viz'yoo wel stôr' ě) n.

1. the telling of an event or series of events in a form that is, or can be seen
2. a simple and clear visualization of an idea, presented on a single “sheet of paper,” for the purpose of guiding a group of people to a specific conclusion.

Sometimes the visual story can be as simple as a hand-drawn sketch, sometimes it's a merger of a rich picture and mindmap, sometimes a high-production quality infographic. The key factor is that it's a story on a single page with the intent to persuade someone to act and make a change happen.

To Be Effective, You Have to Affect People

A visual story is a new starting point from which you can then create presentations, animations, or just stand and speak. It is a proven, simple, effective technique for communicating an idea in such a compelling way that *your audience will want to act on it.*

A visual story does more than communicate an idea. It combines storytelling techniques with visual design to communicate a message that has been fine-tuned for your specific audience. A visual story inspires your audience to act. This matters because an idea that doesn't inspire change or motivate people to act is impotent and powerless. Even an amazingly good idea, like “wash your hands before surgery,” can go unheeded if not communicated well.

Although literally millions of presentations are made every year, most fall into three general categories. Presentations are used to **CONVINCE**, **EDUCATE**, or **REPORT**. Visual stories are useful primarily for situations where the aim is to convince other people. Presentations designed to educate the audience or to report on progress can benefit from a lot of what we have to say, but the process we have developed has a strong focus on reducing the message down to the minimum necessary to influence the audience to take an action. A visual story provides a selected set of information, in a single complete picture, carefully designed to draw your audience from their starting place to the desired conclusion.

While you may ultimately produce your visual story in many different formats, we are going to focus on first getting to the one-page view, as we have found that the focus and effort to get the message to this level enables a better delivery for a wide range of other formats, from presentations, to video, to simply standing at a whiteboard and sketching out the ideas. On the following two pages we illustrate the idea of the visual story, with a visual story about using the process to rapidly improve an existing presentation. As this is a common situation we have dedicated Chapter 16 to be a worked example based on the last two days of this story.

What a difference a day can make

Bob and his team have spent many months developing ideas for a new product. They can describe what it will do, how to build it, and what it will cost.

The team has presented on its product many times, and has standard content that shows the features and lists the advantages.

Sometimes the presentations go well; sometimes the audience seems distracted. The most important audience, with the power to provide the remaining funds, is still to come.

Hi Bob. On Friday we have a chance to present to the business team on the new product proposal. Would you take the lead please?



You've been working on this for months. Put some of the content together and do a dry run tomorrow.



I know we've done a lot of work, but the presentation has over ninety slides and takes forty minutes. We need something shorter.



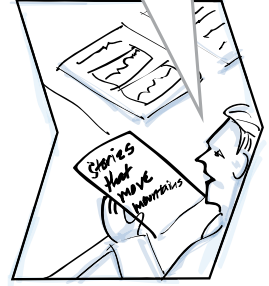
It was too complex and too confusing! Too many words and complicated diagrams. I barely listened to you while I was reading all the slides.



I reworked it last night, really sharpened up the text, removed a lot of diagrams and put in some pictures of people using the new systems.



I saw your presentation today. Your message is still confusing. At the end, I was wondering what you wanted us to do next. I think you need to take a look at this book.



Monday

0900 121200 151500 181800

Tuesday

0900 121200 151500 181800

Wednesday

0900 121200 151500 181800

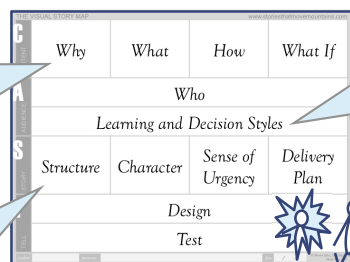
Every day, people make the mistake of presenting what they know, rather than what the audience needs to hear.

A little simplification can go a long way toward improving the audience's experience.

But, if you want to really engage the audience, to get a reaction, it's time to think differently. It's time for a story.

Clarify the goals and the result to be achieved. Map out the content to remove the excess and sharpen the focus.

Translate the content into action. Turn it into a story with characters motivated to achieve the goal.



Assess members of the audience to determine what they need to know.

Define the conflict.

Show the struggle.

Achieve the goal.



Return to ask the audience for support.

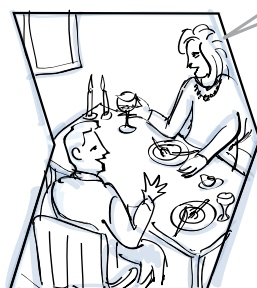
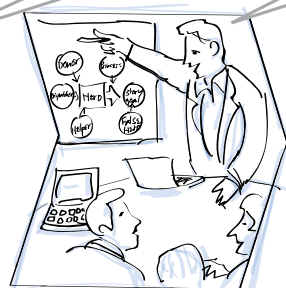
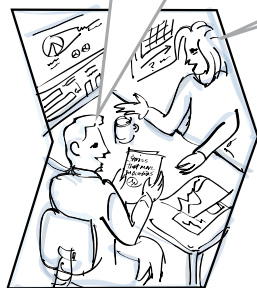
I read this book last night, and I want to see if we can do something different. We have the content; we just don't have a compelling story.

Let's get the team in a room. It's always easier to make progress when we can create and review together.

We'll follow the CAST process to turn our content into a visual story. This will help us put the audience first and tell a story that has real meaning for them.

I don't mind you bringing your work home. The story makes your ideas easy to follow. You know I don't understand most of the technology you use, but with the story and the handout I don't need to.

That was a great way to explain the ideas. I really feel like I know where we're going, and why. You can count on me. One day you'll have to tell me your presentation secrets.



Thursday

Friday

0800	1000	1200	1400	1600	1800	2000	2200	0900	1200	1500	1800
------	------	------	------	------	------	------	------	------	------	------	------

Most visual stories take longer than a day to create, but if you already have the content, it's possible to make a big difference very quickly.

Chapter 16 shows what Bob and the team did on Thursday and Friday. If you're keen to understand more you can jump ahead, but be warned, we cover a lot of ideas and techniques in the chapters between here and there.



Every year, the senior executives met to review the strategies for different parts of the organization. Each year, the IT director presented the updated IT strategy to the board. He was usually allocated 15 minutes on the agenda. For many years the IT director had presented a document of approximately eight pages, and each year, the group of executives indicated their approval. There was no real discussion, and the IT department wasn't seen as strategic to the performance of the organization. Each year, real opportunities for change were lost because changes in technology and the Internet were not considered a priority by the senior staff.

A new IT director was appointed at the start of a major period of change. This wasn't a small reorganization. Whole departments were undergoing changes, and at the same time, a major update of the IT infrastructure and line of business systems was planned. I was hired to work on this upgrade and to support the implementation of the IT strategy. It was an ambitious program that would affect every major business function. Over a two-year period, it would replace tens of thousands of computers, upgrade the network and data centers, and replace core business systems.

Failure to convince the executive staff of the need for this strategic, and expensive, change could mean that the people we needed to involve would not be ready, significantly delaying the program and really increasing the costs. There was also a big risk that opportunities

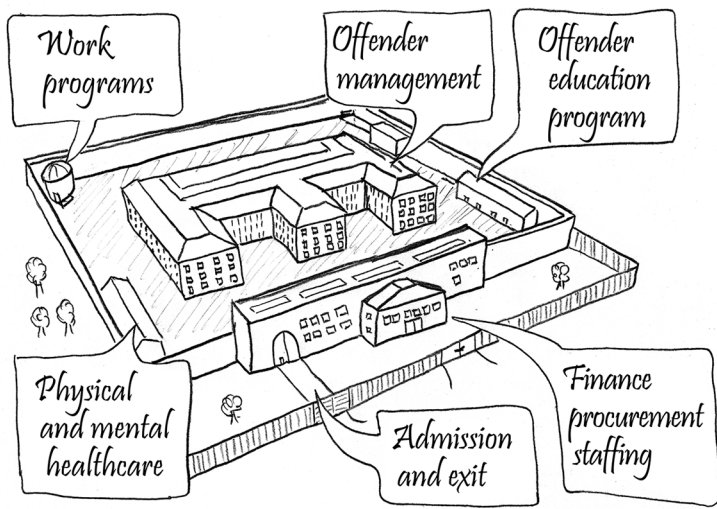
Convincing Evidence

Early in the development of the visual story process, well before it had the name and structure we use in this book, Martin used the technique to help change the relationship between the IT department and the rest of the organization in Her Majesty's Prison Service.

for improve-ments to the business processes would be lost if we didn't secure the engagement needed across the organization. As the date for the annual strategy presentation approached we knew we had a golden opportunity to change the way the prison service worked with its technology team. This opportunity was rare, and because we were both new, we could try something different.

The day of the meeting came, and at the appointed time, we turned the projector off. Instead of showing a PowerPoint deck or an eight-page document, we distributed a large-format, printed copy of a visual story, one page, and held our breath. What they were looking at was a well-known picture of a training prison with a series of small stories around the edges, each relevant to different members of the board, in the context of the overall business of the organization. The stories captured the impact and detail of changes over the next three years.

The original one-page visual story is probably somewhere in the prison service archives, but it would have far more detail than is appropriate to share here. This sketch gives an idea of what the visual story looked like and the topics for the stories.



The difference was immediate. No one said anything. All eyes were on the visual story. After a few minutes, the IT director began to speak. He talked them through the major technology changes from the perspective of the prison, using different parts of the central image as the starting point for a series of small stories.

After 30 minutes, the questions were piling up. After 45 minutes, the session was called to a halt. We had exceeded our time, but the outcome was very different from prior years. All of the department heads now had an action to establish regular one-on-one briefings with his or her IT representative. It took a little while for the IT strategy to get approval. Many questions now needed answering, but the change in the relationship between IT and the department teams had started.

The Visual Story Process

This book is for visionaries and educators, change agents and revolutionaries, motivators and drivers. If you prefer the status quo, or your business is not changing, you probably don't need this book. But if you want to influence others to make a decision, improve something or agree to a change, read on. We can help you.

We've been experimenting with the production of visual stories for years. We've utilized research from a wide array of fields, conducted some of our own, and looked at the work of many other groups struggling to make effective communications. We have failed as many times as we have succeeded. When we examined why we failed it was clear that we had skipped some part of the analysis, or rushed to create a visualization without first getting clarity on why it mattered to the audience. When we succeeded it was also clear that we had first created a good one-page visual story to clarify the focus of the message before developing other formats to communicate the story.

The visual story looks simple, and in its simplicity, it is powerful. Clear simple messages are easy to consume, use, and follow. *But clarity and simplicity are not easy to produce on demand.*

We have made it as easy as possible to create a visual story, but doing so still requires work — more work than you would normally put into preparing a presentation. Making change is hard. Communicating change is hard. With visual stories you can at least improve your success rate.

*What do you have to gain? That's up to you.
Where do you want to take the world today?*

CAST and the Visual Story Map

Over the next few hundred pages we are going to cover a lot of material. Chapter 1 explained why the visual story is important. In this chapter we provide an overview of what we you will learn, and in Chapter 3 we explain how you can get the most from this book. Because we are going to show you how to bring together a wide range of different techniques we thought it would be very important to provide an overview, so you can see how it will all fit together, and also to give an early insight into where all of the techniques we use have come from. Each chapter will provide a lot more detail on the sources for the techniques, and you can find a prioritized list of references in the Appendix.

The Visual Story Map

The diagram below is called a *Visual Story Map*. We developed the Visual Story Map to illustrate the process for creating a visual story, and to show how the steps of the process relate to one another. We named the process *CAST* after the four main steps shown vertically on the far-left side of the Visual Story Map: Content, Audience, Story, and Tell.

*I keep six honest serving-men
(They taught me all I knew);
Their names are What and Where and When
And How and Why and Who.
—Rudyard Kipling, Nobel Prize-winning
novelist famous for his short stories.*

THE VISUAL STORY MAP				
C CONTENT	Why	What	How	What If
	Who			
A AUDIENCE	Learning and Decision Styles			
	Structure	Character	Sense of Urgency	Delivery Plan
S STORY	Design			
	Test			
T TELL				

2

CONTENT ROW Many presentations have too much content that is not relevant to the decision or change being proposed. If you want your sales team to search for new customers, or your IT group to implement a new content management system, your content must lead the audience to understand why you want them to act, and what they must do.

AUDIENCE ROW You need to understand the people you're telling your story to. What do they need to know? How can you motivate them to respond in the way you intend? Whether you want your design team to develop a new logo, or your CEO to approve a new project, you need to consider the different people in the audience.

STORY ROW When you are clear about the content and your audience, you can focus on the story structure. We draw from centuries of practical experience of how to tell a compelling and interesting story. Using the format of a story, rather than simply presenting information, makes it easy for your audience to identify with your goals, remember your ideas, and agree with your suggestions.

TELL ROW Now you create the words and visuals to focus on the telling of the story. Work out how the story will be conveyed in different formats and test that it has the intended impact. Careful attention to the different ways a visual story can be told can make the difference between a clear story and a muddled message.



I am responsible for figuring out the simplest way to solve difficult software and technology problems. Often I need to create a solution and then explain it to dozens of different people, each with their own questions and concerns.

Before I understood how to create a visual story I would create a long series of diagrams to explain my ideas, using different pictures for different purposes, or running through a series of diagrams in a presentation. More than once, after throwing picture after picture at my customers, I'd sit back and marvel at my skill and wait, patiently, for my customer to agree. After all, I'd given them all the evidence they needed to see that my design was good, solid, and skillfully produced.

Usually, this approach failed. Sometimes, it failed miserably. I tried for a long time to understand why. Certainly, I understood what I was trying to say. Why didn't they? Was I an eagle working with turkeys? Was I a conceited, self-important geek wrapped up in my own complexity? Was I speaking Hawaiian to a Spaniard?

After Martin shared the techniques for creating visual stories with me, all that changed. He showed me how a well-crafted visual story uses scientific methods, developed through decades of research in psychology, linguistics, design, and education, to motivate audiences to act. After a little practice I was a changed man. Now a single page from me could tell an entire story, not only to help people see what I was trying to say, but also to motivate them to care about the changes I proposed.

My ideas became compelling, and then to my surprise, easy to remember. Some of my visual stories started to "go viral," as I presented a story to one person and he or she used it to present those same ideas to others.

Good **CONTENT** Makes For Good Stories

Before you create a story, you need to be very clear on what the story will be about. In Chapter 1 we said that the purpose for most visual stories is to motivate your audience to make a decision, take an action, or make a change in their business or life. Chapters 4 through 7 cover the Content row of the Visual Story Map. In these chapters we show you a series of techniques to refine your content to focus on the outcome you want, and to filter ruthlessly to remove anything not directly relevant to the desired action.

Over the decade it took us to become skilled in the CAST techniques, the hardest lesson was accepting the importance of working on the content *first* and then building the story and presentation materials. Every minute you spend understanding the relevance of the content to your audience is returned tenfold when you get the story right.

The Content row includes four elements, Why, What, How, and What If.

THE VISUAL STORY MAP				
C CONTENT	Why	What	How	What If
	Who			
A AUDIENCE	Learning and Decision Styles			
	Structure	Character	Sense of Urgency	Delivery Plan
S STORY	Design			
	Test			
T TELL				

WHY People do not like to change, and where possible most people will avoid making decisions.

Your story has to give them a clear reason to act. We find that the best way to be clear, and remain clear, is to make the reasons for change as explicit as possible. This includes identifying any external influences that your audience should react to, as well as the personal goals of your audience that can be tied to your story.

WHAT If the reasons for change are already known to your audience, you can bet that some people have already thought about the “broken” things that need fixing, or the new things that need to be added. However, you must also consider all the “working” things that may need to change, and the things that could be affected but should be left alone. In a business setting the things you might have to think about include processes, buildings, machinery, systems, people, customer experience, and information that will change or be affected by the change.