Presenting, Documenting, and Exploring Visually

**UZMO**

Thinking With Your Pen

Presenting, Documenting, and Exploring Visually

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**Containers**

- Basic Visual Vocabulary

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The more complex and virtual the challenges of a knowledge society, the greater the need for methods with which to overcome them. With his tried and tested bikablo® visualization technique, visual facilitator Martin Haussmann has proposed a surprisingly simple, convincing, and comprehensive approach to these challenges.

**Visual Facilitation, Visual Storytelling, Graphic Recording and Sketchnoting**

- You will learn to quickly and easily record your thoughts with sketches, to present them with passion and the aid of a simple marker, and to render meeting and workshop dialogues visible and thus foster a collective understanding of the process.

**UZMO – Thinking With Your Pen**

is at once a language book and a travel guide, a training program and a manual, a map and a vocabulary book for your journey into the world of visualization.

No artistic talent required. Just a pen and some paper!

1st English Edition 2017

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**Below is a brief selection of visual terms to ease your first steps in the world of visualization.**

You'll find additional pictograms on the inside flap!

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**From Content to Design**

- Graphical & Diagrams
- Welcome
- Context
- Content Design
- Pictorial Landscapes
- bikablo® technique & visual vocabulary
- Information Graphics
- Key Visuals
- Abstract Pictorial
- Simplified Complex

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**Appendix**

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**The Practical Guide to the bikablo® Visualization Technique**

exclusively at neuland.com

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“**This book is a geode full of gems. Break it open and enjoy all the beauty and crystallization of visual practice inside.**”

Brandy Agerbeck
A person sits there and draws – for all to see. He distills on paper the elements of a shared environment that resonate with him, and thereby creates a mutual experience with the casual observer. And in turn, an opportunity for communication.

Subsequently, I worked as a communications designer and illustrator, and then about 10 years ago, in cooperation with the organizational consultancy Kommunikationslotsen (communication pilots), I discovered the power of visualization for dialogue and change processes. In 2015, we finally founded the bikablo® akademie for visual thinking, learning, and collaboration. To this day, I still draw. Together with my visualization colleagues from bikablo®, I attend meetings, workshops, and conferences, and use my marker to express the knowledge and dialogues gathered from them in a visual manner, and teach others the same skill. We call it “Sketchnoting,” “Graphic Recording,” or “Visual Facilitation.” This calls for a completely different approach to drawing which does not actually require artistic skill: Unlike the naturalistic approach I took in my early sketchbooks, this visualization is a two-dimensional, pictorial type of writing made up of graphic elements, pictograms, and figures.

My portraits of people are just as lousy as they used to be. But thinking back on those times when I traveled the world alone with my backpack and sketchbook, I realized that it was never really about that. It dawned on me that sketching is itself a form of dialogue, between the drawer, the drawing, the surroundings, and the people who are part of it and see their world reflected in the work.

Without knowing it, I was laying the foundation for the subject of this book:

*Drawing, to spark a conversation.*
... and as I mentioned above, this is a kind of “drawing” that doesn’t require you to be artistically trained, or even “creatively inclined” (whatever that means). Both are helpful, but not necessary. The approach I use, therefore, is something I have called the bikablo® technique (more on this starting on p. 44).

Try it out: Grab the nearest pen or pencil and draw the UZMO light bulb from the book cover using the letters U, Z, M, and O.

If you succeeded – and by that I mean that you can recognize your light bulb as such – then you’re already a visualizer, regardless of whether or not you think you can draw.

Here are a few light bulbs drawn by my neighbors in Cologne, who claim they don’t know how to draw.

The UZMO light bulb is not my invention, but rather came about by chance in one of our training sessions, and has been a faithful companion for a few years now.

Has this made you want to try your hand at drawing?

Then let’s carry on visualizing: You, my reader, and I, your guide, are about to enter a world of visual language:
As you can see, it’s very easy. A piece of paper, a pen, and a few letters and basic shapes which you can arrange. That’s all you need to get started.

Visualizing is not an art, but a modern cultural technique that can revolutionize the way we think, learn, and work. Visualization is at once a very old and a new language which we all speak, often without even knowing it. By using visual language, we can extend the boundaries of the verbal language which we employ in a linear fashion when speaking and writing. Because drawing is like speaking – but in a different way.

The basic procedure is simple: While conversing (with yourself or with others), you take your pen and quickly convert what was said or thought into a visual form on a piece of paper. You are thereby making the invisible visible, the intangible tangible, and giving shape to what is diffuse: ideas of ideas, muddled thoughts, half-baked questions or vague notions. You are freeing individual ideas from mental isolation, and making them accessible to others.

The observer (be it you or your speaker) then gets the chance to expand on what was drawn, let the visualized idea sink in, test its relevance, weigh it against other ideas; and come up with a good question that can spawn other ideas in turn.

Whenever we converse, each of us formulates his thoughts in words. The other person hears them, connects them to his own thoughts, and expresses his thoughts in turn. This constitutes a normal verbal dialogue, in which the thoughts themselves remain concealed given that we merely hear their verbal formulations. This is why it is often difficult for us to understand what was said, to filter out the essentials, or to verify whether we have truly grasped the meaning.

However, if I take a pen and draw my thoughts (that is, draw what I’ve understood from your words, how they have resonated with me, or what my own ideas are on the subject), I am opening a second channel of perception, and this visual channel offers entirely new possibilities of expression as opposed to the verbal. You will effectively be getting “twice” as much information, which you can then reflect on, assess, and attune to your own thoughts. Visualization thus becomes the “third speaker” of our dialogue.

“The limits of my language are the limits of my world.”
Ludwig Wittgenstein
Your reaction can therefore be much more refined: You can formulate what you like or dislike about my visualization, whether your thoughts can identify with it, and what ideas the image has sparked in you.

I, too, can be spurred on to new ideas, questions, and suggestions in the process.

... what I mean!
Aha! Now I see
... what you mean!
... what we mean!

If you, too, begin to think with your pen, and we manage to develop mind maps together, our dialogue can begin to explore completely new dimensions. As a result, the solutions that we reach will be better thought through, more thoroughly examined, and imbued with a much deeper understanding of the thoughts and feelings of the other person.

Visualization offers a fantastic array of possibilities for developing ideas, for absorbing or conveying knowledge, for finding solutions together, and for fostering prospective change processes.

Those possibilities are the subject of this book.

Welcome to UZMO - Thinking With Your Pen!
Do you know what an educational process manager does? What macro environmental analysis consists in? Or what key performance indicators are? If you do (and I myself have only a vague notion), would you be able to explain it to someone else?

There was a time when people could explain their professions by citing procedures, tools, workplaces, and results. My great-grandfather was a carpenter. He stayed in his workshop and built cupboards and cabinets using carpenter’s tools. One of his products can be admired in my kitchen to this day. My grandfather was a tailor and made aprons. And although these professions still exist, our culture abounds in activities that take place on the computer screen, the telephone, and in the conference room. Process designs, evaluation tools, and performance portfolios can no longer be seen and touched like a cabinet or an apron. Our work has shifted to the virtual world. But somewhere between the workbench and the desktop something tangible has been lost. In moving from the workbench to the desktop, our work has become intangible and complex. But does the digital workplace really provide us with the right tools?

What we do can no longer be explained by how we do it or by what it means. Nor by what it produces. Globalization and digitalization are catalysts, accelerators, and are also a result of this development. The tasks of knowledge workers are becoming increasingly diversified and complex, but their tools are fewer: a computer, a couple of programs, and a phone are usually enough. The richness of our world of objects, attested by my great-grandfather’s tool shed, as well as our bodies and our senses, play an increasingly negligible role in the digital age. For all that, our perception and thought apparatus are largely unprepared for dealing with the onslaught of virtual knowledge; we have a hard time grasping abstract information. We are unable to retain large quantities of data and facts; and we have trouble seeing the bigger picture amid a profusion of links and interactions.

And sharing the totality of this information with others tends to overwhelm us.

This is one reason why the visualization of information on the computer screen by means of graphics, diagrams, and visual metaphors has already become a basic strategy of knowledge work. This, in turn, has led to two further questions:

- Are these the right tools for social, sensory, and sense-seeking beings like us to process and master the knowledge we acquire?
- And will it allow us to share this knowledge in a meaningful way with other people working in the same complex system? That is, will it enable us to reach a deeper, constructive, and mutual understanding about a shared goal?
The Visual Revolution Is Devouring Its Children

The Macintosh 128k was created in 1984. It was the first mass-produced computer operated by a graphic desktop instead of a text (program code). The screen mimicked the “old” office set-up with a desk, files, and a wastebasket. You would open folders containing documents and tools. In short, the “Mac” made the interface between man and machine straightforward and self-explanatory.

The new programs quickly broke into the market, which made it child’s play to create presentations and images, and merge texts and pictures into layouts. This was an intuitive way to handle knowledge and streamlined the editing and communication process.

Once the visual language was unleashed, however, there was no turning back: The flood of information was compounded by a barrage of images. And one of the “waste products” of the digital-visual revolution is the vast quantity of graphics, icons, and symbols accessible to all and sundry. The presentation software PowerPoint was the first warning sign of a culture at risk of drowning in its own visualization by way of information processing, presentations, and knowledge transfer. Subject matters are reduced to bullet points. Text content, data diagrams, and graphic embellishments rain down on us with a speed that numbs the mind. The visual revolution is devouring its own children.

Knowledge workers have become knowledge designers. But how to convey knowledge meaningfully in a visual manner is not something that you will learn from a computer (graphic machine). If visualization is the “universal language of the 21st century,” as the information scientist Robert E. Horn proposes in his book *Visual Language*, how many of those who use this language can claim to have mastered it?

Today, knowledge workers face three challenges: Rendering knowledge visible in a structured and meaningful way; salvaging it from the virtual world and making it tangible once more; and establishing a new culture of participation and dialogue between people and organizations.

Visible, handmade, and participative are three trends which seek widespread forms of expression. We will discuss these at length in the coming pages.
Varieties and Applications of Visualization

Visualization comes in many forms, and content can be turned into design through any number of contexts, the aim always being to support learning, dialogue, and change processes. Below are a few noteworthy players and their techniques.

Visual Presenter
I use “visual presenter” as a blanket term for all people who extensively employ visual methods in schools, training programs, apprenticeships, and further training. The central aim is to make content more easily assimilated through visualization, e.g. using infographic posters or concept posters.

Sketchnoter
The Sketchnoter draws what he hears and sees in readings, presentations, conferences, or meetings in his sketchbook by means of text, pictograms, or other graphic elements. In this way he documents the knowledge he has acquired for himself and can then supplement it, reflect on it, and share it with others. Sketchnoting is not so much a profession as it is a skill used by students, knowledge workers, and consultants for their own learning benefit.

Graphic Recorder
The Graphic Recorder records content during presentations and dialogue situations. He creates large visualization murals, series of individual drawings, or shares his work in realtime using a document camera. Graphic Recording is most often used in participative group conferences. This serves to secure the knowledge gained from the dialogue process and gives the group the chance to develop a collective understanding by reflecting the visualized content.

Meeting Facilitator
The meeting facilitator oversees the process of self-regulated dialogue. As a moderator in meetings, workshops, or team developments, he puts his participative and evaluative role and his dialogue methods at the service of a given group’s development goals. Different Meeting Facilitators will apply their visualization in different ways, but they are all presenting their concepts and principles using a visual paradigm. They can use poster templates to enable a small group to work in a self-regulated manner, or they can use moderation cards or mind maps for the purposes of visualization. While the Meeting Facilitator focuses on the context of the dialogue process, the Visual Facilitator renders the content visible.

Visual Facilitation Trainer
A person who teaches other people visualization techniques and skills. A visualization training program can be part of an individual’s further training, or part of a group process in which the participants are taught to use visual means to express themselves.
Visual Coach
A coach assists a client in finding and reaching development goals, and Visual Coaches in particular employ a range of methods for this purpose: posters to introduce concepts, thought sketches to visualize their ideas or those of the client, or dialogue maps like the “Ferris Wheel” technique (see p. 246), in order to guide the client to a solution in a structured manner.

Organizational Development

Visual Facilitator
A Visual Facilitator is a process consultant who uses a pen. He takes part in dialogues by illustrating the participants’ contributions, ideas, questions, and suggested solutions in the form of dialogue maps. In this way the Visual Facilitator supports the group in their investigations and proposed solutions, using different creative techniques, group methods and layout templates, ensuring a seamless transition to the work of the Graphic Recorder and the Meeting Facilitator, who often work hand in hand.

Info-Illustrator
The Info-Illustrator (infographic artist) works from a desk. Based on the dialogue he has with the Change Facilitator and the organization, he develops strategic visualizations out of text, images, and graphics, intended to render complex issues intelligible to employees, clients and business partners.

Change Facilitator
A Change Facilitator accompanies organizations through processes of change. He helps them overcome obstacles and formulate strategies. This is combined with a clear commitment to the “wisdom of the majority,” in other words, the decision to use the knowledge of an entire system. The Change Facilitator does not only offer advice on Content, but oversees the entire process and serves as an expert on the dialogue methods. In conjunction with a pilot group and a Graphic Recorder he can organize large group conferences, for instance, or in conjunction with an Info-Illustrator he can create strategic visualizations of change processes. As a Moderator for individual dialogues within the overall process he is also a Meeting Facilitator.

Personal Development

Videoscribe
Videoscribing is a presentation technique popularized by the “RSA Animate” videos as seen on YouTube. The Videoscribe draws a complex diagram in fast motion while the narrator explains its content. The Videoscribe is thus an Info-Illustrator for moving images.
On the cover flaps of this book I’ve compiled the most important pictograms of the bikablo® technique*, including of course the UZMO light bulb! All of them have been subjected to extensive practical tests.

- They are composed of the least amount of strokes and are therefore easy to draw.
- Wherever possible, they are made up of letters and basic visual shapes (see the second principle of the bikablo® technique).
- They are versatile carriers of meaning and can be used in countless different ways.

Try drawing your favorite pictograms with a black marker, and ask yourself the following questions:

- Where do basic shapes stand out?
- What are the proportions of the basic shapes?
- At which points do they “touch”?
- Where should the shading be applied?

You will quickly learn how to “pronounce” these visual terms fluently, and in the “color” section of this book you will learn how to color and shade the pictograms.

* You will find a comprehensive collection of 120 pictograms and 90 figures in the card collection bikablo® icons. See the appendix for further information.
**Effect Lines**

Comic illustrators use these aids to visualize the invisible, and bring out a specific action: The speed and direction of a shot, the nodding or shaking of the head, a steaming cup of tea, or Donald Duck shivering on ice skates. I call these visual aids “effect lines,” and they help bring movement into your visualization. Effect lines can make your pictograms quick, slow, hot, loud, or quiet. They also help your figures express their feelings and go into action.

**Book tip:** In the very entertaining *Lexicon of Comicana*, cartoonist Mort Walker explains the different elements of comics (captions, effect lines, speech balloons ...).
Visualizing often means telling visual stories. Whether you wish to illustrate the tasks of a company’s department, a “customer journey,” or a team situation, it is always helpful to have a few simple figures up your sleeve.

Depicting the human body is actually one of the greatest challenges of the visual arts. But for the purposes of the bikablo® technique, it’s very simple. We have devised a few easy methods for drawing figures in a systematic, gradual manner.

If you want to depict someone walking, standing, or running, two “V” shapes are all you need for the legs.

The UVo Figures

The UVo figures are applied in modular fashion, meaning that you only use the parts that serve a specific visual statement.

This figure consists of the letters U, V, and o. But a lower-case o and a capital U are really all you need to indicate a figure. Even without arms or legs, it is still good for a world of adventures.
Finally, there are a range of accessories at your disposal, with which you can indicate groups of people, distinguish men from women, and clarify specific roles.

Sometimes hands are also necessary, which is why we developed four “codes” which can simply be attached to the arms and complete the UVo figure.

Two additional V’s will serve as the arms, and whether stretched or bent they can hold, indicate, or point.
Join me on the SymbolSafari! We will be embarking on a creative expedition in which abstract terms are made into lively key visuals. This is a method that you can also carry out in a group setting.

Previously, I showed you a simple combination you could use to create key visuals. As the terms become more complex and abstract, however, a simple creative technique can be a good option.

In the bikablo® training sessions the participants are often faced with the following question: “I’ve learned how to draw neat lines; I’ve improved my handwriting; I can turn the basic shapes into different visual vocabulary; I have learned how to use several coloring techniques; tomorrow I need to make a presentation on the topic Occupational Disability Insurance; so how do I find the right key visual?”

If you happen to ask professional illustrators or graphic designers how they come up with their ideas, they will probably say something like, “I really don’t know. I just start sketching and sooner or later an idea emerges.”

The transformation of abstract content into pictures is a myth that is seen as something “creative.” The fact is that there is always a specific technique behind it, even if that technique is often applied intuitively. And it is a technique that can be learned. In order to teach people without artistic backgrounds how to turn words into pictures, I’ve turned my own style of pictorial invention into a step-by-step technique that I call SymbolSafari. Like many other creativity techniques, this one uses the principle of association and works best in a team of three to five people; but it can also be done alone or in larger groups.

SymbolSafari can be used to develop a key visual for your presentation or a logo for your project. You can also employ the technique to lead a group into an abstract subject matter, or make a taboo or emotionally charged subject more accessible. The SymbolSafari method can be changed, abbreviated, or incorporated into other dialogue processes.

The Basic Steps of SymbolSafari:

1. Select a **key term**.
2. Associate other **terms** or **images** with it.
3. Combine these images playfully with each other into **key visuals**.
4. End by **discussing**, **assessing**, and if necessary **developing** these key visuals further.
1 Introducing the Method and Finding a Key Term

Present this method to your group and establish the goal of the exercise:

Is it about developing a key visual to be used in a particular context?

Or is the aim to explore a given term to facilitate an in-depth discussion?

Now select the key term together with your group, and make sure that everyone in your group can identify with the term in some way. If in doubt, have the person who has suggested the term (the “key term sponsor”) provide a brief explanation.

2 Prepare a Brainstorming Session

The pinboard format is ideal for this brainstorming phase. Draw a circle that divides the surface into two more or less equal parts, and write your key term in the middle.

It will be helpful for the group if there is already a selection of pictograms and figures available. The bikablo® icons are specially designed for this purpose and include 210 picture cards depicting objects and figures that you can stick on a pinboard (refer to the appendix for more on the bikablo® icons).
Recently I bumped into my old friend Lina. We hadn’t seen each other in a long time, and Lina looked weary and downcast.

I can’t stand it anymore. My father is chronically ill and can’t leave the house for weeks on end. He can no longer look after himself and I feel like I’m stuck with all the responsibilities: cleaning, obtaining housing benefits, making doctor’s appointments, and so on. He’s always calling me to ask for something, and we usually end up fighting. I’m going to have a nervous breakdown. How long will this continue? I’m utterly confused. I need a coach!

Now, I’m not a coach, but I know a thing or two about utter confusion, so bear with me and I’ll get a pinboard and a couple of pens.

Let’s start by writing out a wishlist. What would you wish for? What would you like to change?

That’s easy, I no longer want this responsibility, these countless tasks. I want him to get better. I want to be free to decide whether or not I will see him. I want to get rid of this pressure.

From a Vision of the Future to a Plan of Action: The Ferris Wheel Technique

This is the story of Lina and her father – and the question of how to guide your dialogue partner to a solution by visually directing the course of your discussion.
Great. Now imagine we’re in the future, and everything has been taken care of. Describe a situation in which you discover that your wishes have been granted.

Well … I can pay my Dad a simple visit, and we can watch our favorite show together and drink a beer.

OK, I can draw that for you. What else should I include?

He’s healthy. His apartment is clean. He’s cooked me a meal. We talk about everything under the sun and not only about his illness. The cat sits on my lap. Things are like they used to be. That would be wonderful!
That’s our target scenario. Now try and visualize it a little more. You’re sitting next to your father in front of the TV. There’s a delicious meal on the table in front of you. You’re chatting, laughing, and having a great time.

Yes, I can visualize that very clearly.

Now imagine that I call you, and you tell me what you’re doing, and I ask you, “Lina, how is it that you’re having such a wonderful evening with your Dad? What made it possible?”

Well, it’s just that the things that used to take up all our time have been resolved.

Be specific. I’ll write it around the center.

Someone has to request a level of care.

Formulate it from the future. What has been taken care of? A level of care has been requested. And what else?

Let me think … OK: My father makes his doctor and rehab appointments. The housing benefits have been applied for. A cleaning lady comes in once a week. His fridge is always stocked and other errands have been run.
Is that it?

Basically, yes. Wow, that’s already a load off, now that I see it written down it’s not so confusing. That’s taken care of!

Great. Now tell me, what have you and your father done so far to make these things happen?

Let’s take the issue of house cleaning: I’ve asked around in my building if anyone knows somebody who cleans houses. Maybe I should start by interviewing somebody. Come to think of it, there aren’t even enough cleaning products in the apartment. You should see the state of the place!

So, let’s put it in order: Look for a house cleaner, select one, interview him, and set a date. Buy cleaning products – I would put that in the “errands” category. What’s missing, specifically?

Certainly a new mop. A vinegar-based cleaner. I’d have to see about the rest.

Then I propose drawing up a small extra list: “Clarify!”

In terms of errands I just thought of light bulbs, trash bags, fitted sheets …

And that’s it, I think we’ve got everything.
The ten Principles of the bikablo® Technique

1. Use the available visual vocabulary
2. Create visual terms out of basic shapes
3. Start by drawing a black outline
4. Mark, color, and shade in
5. Visualize step-by-step

6. Be aware of how you use writing and content
7. Take a strategic approach to color
8. Combine visual terms to create new carriers of meaning
9. Create structures and processes by overlapping
10. Use layout templates for making posters

[Key visuals for each principle are shown, including pictograms and figures to illustrate the ten principles.]

[Additional text and graphics related to the principles are shown, including a selection from the visual method card set bikablo® icons consisting of 210 pictograms and figure cards. Go to: www.neuland.com]
Graphics and diagrams (p. 82) are abstract and simplified representations of numbers, quantities, and other forms of data. They can be used to illustrate a variety of parameters like quantity and time, and their relationship to each other. Or they can explain a subject matter with just a few strokes of a pen. Thought sketching (p. 104), is a quick and easy way to make ideas visible.

Infographics (p. 110) are abstract and complex representations, designed to convey the process or structure of larger amounts of information. The infographic technique (p. 122) will help you convert abstract text content into a visual format.

Key visuals (p. 132) are pictorial and simplified. They can be individual pictograms or a combination of pictograms and figures. Key visuals can be used to visualize abstract terms, illustrate situations, or create “action logos” for your project. The creativity technique known as “SymbolSafari” (p. 140) has proven effective for this purpose.

Pictorial worlds (p. 146) are complex pictorial representations with coherent, narrative motifs, designed to illustrate the many moving parts of a given topic, as if on a stage. They too can be created through a step-by-step procedure (p. 156).
The more complex and virtual the challenges of a knowledge society, the greater the need for methods with which to overcome them. With his tried and tested bikablo® visualization technique, visual facilitator Martin Haussmann has proposed a surprisingly simple, convincing, and comprehensive approach to these challenges. **Visual Facilitation, Visual Storytelling, Graphic Recording and Sketchnoting** – You will learn to quickly and easily record your thoughts with sketches, to present them with passion and the aid of a simple marker, and to render meeting and workshop dialogues visible and thus foster a collective understanding of the process.

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