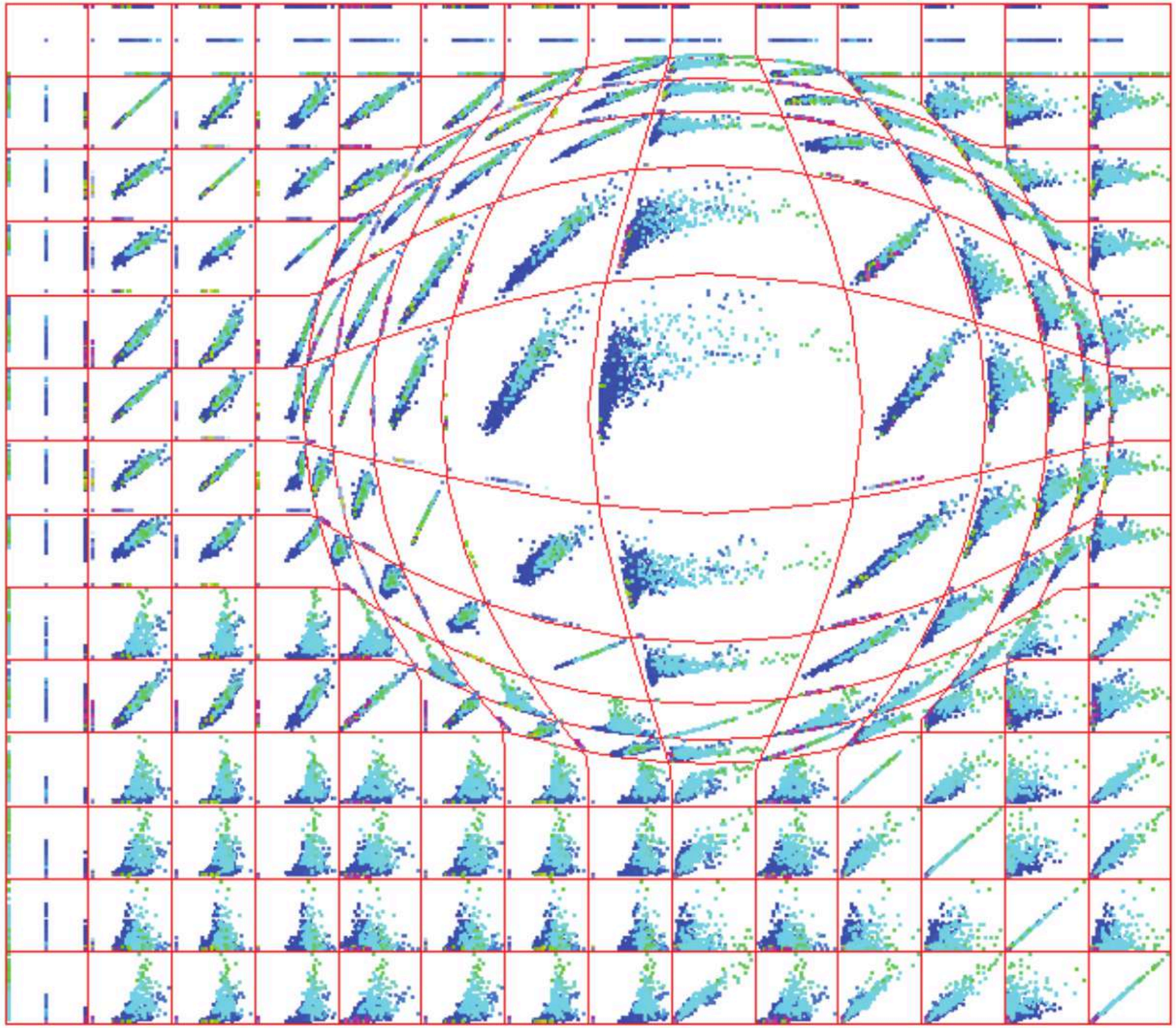
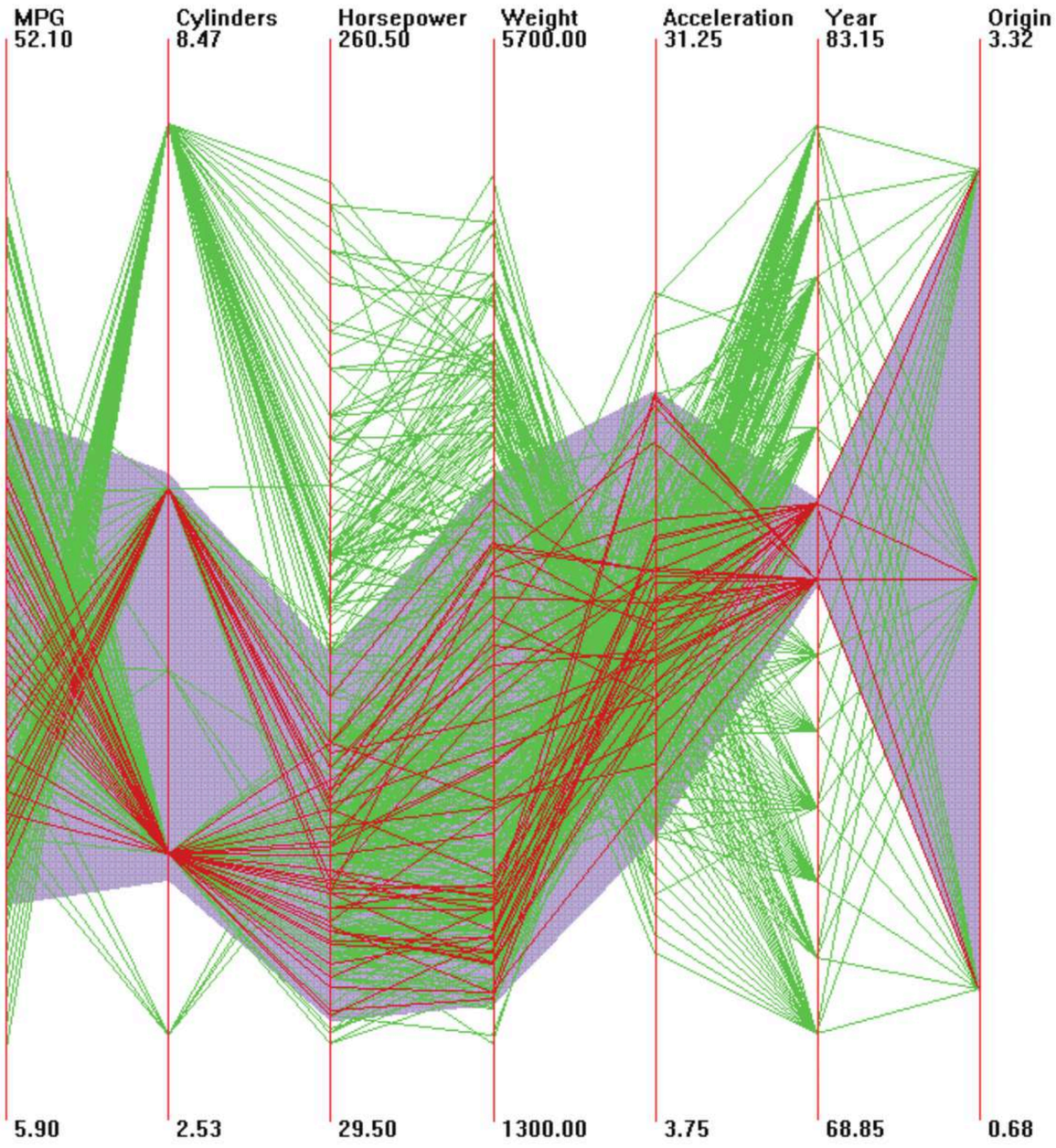
Interaction

#7516

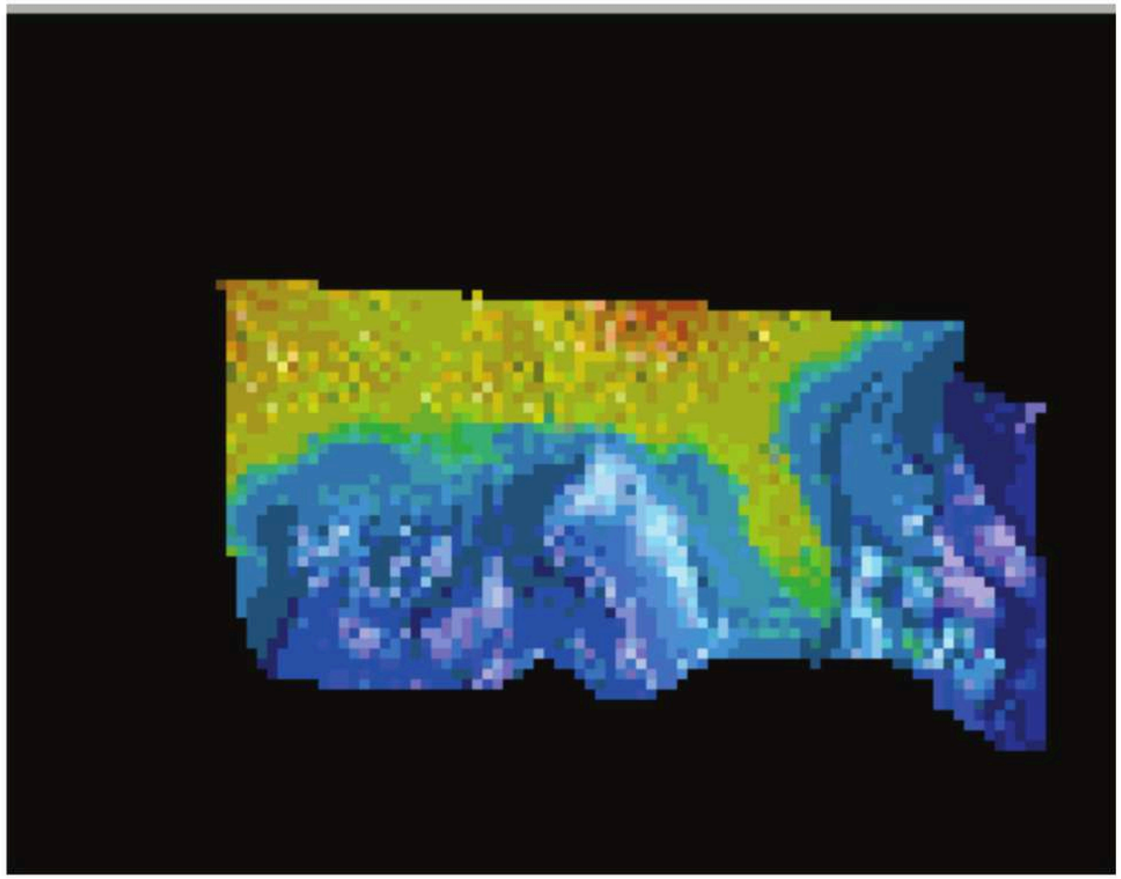


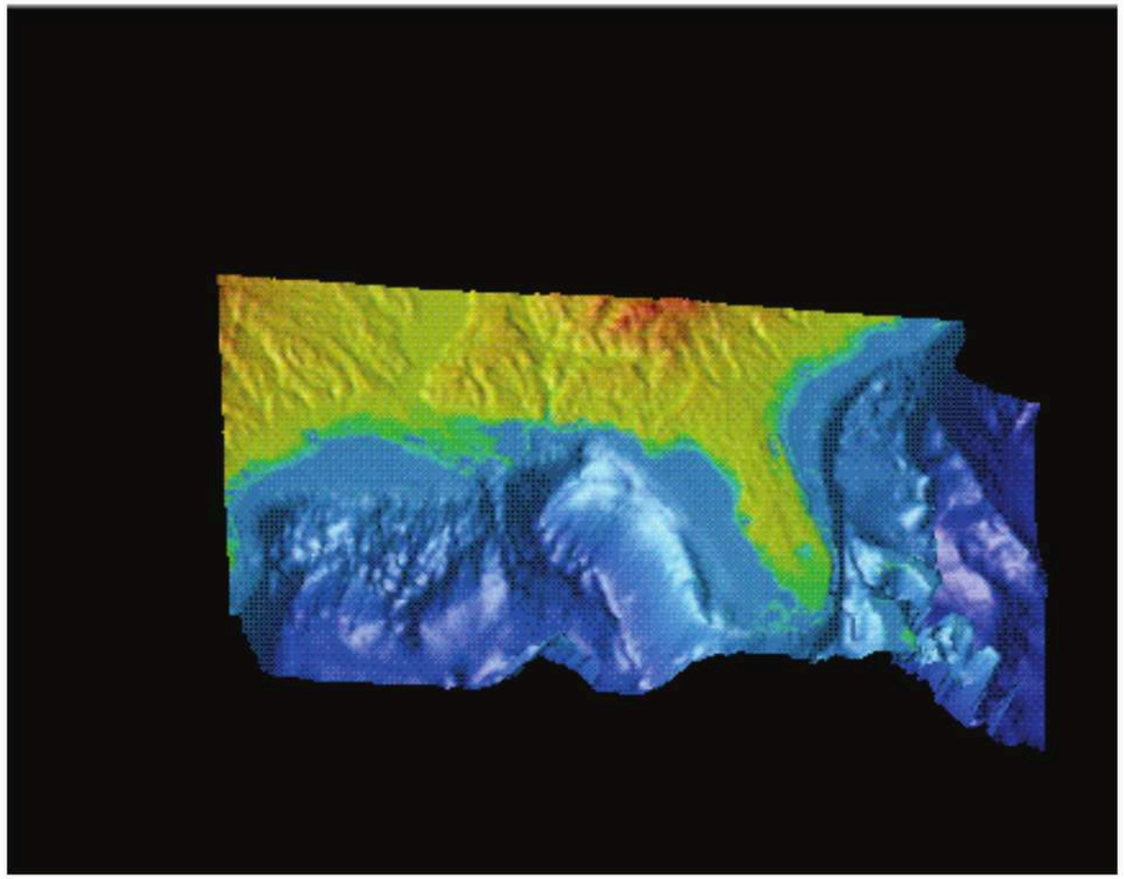
Distortion in Screen Space

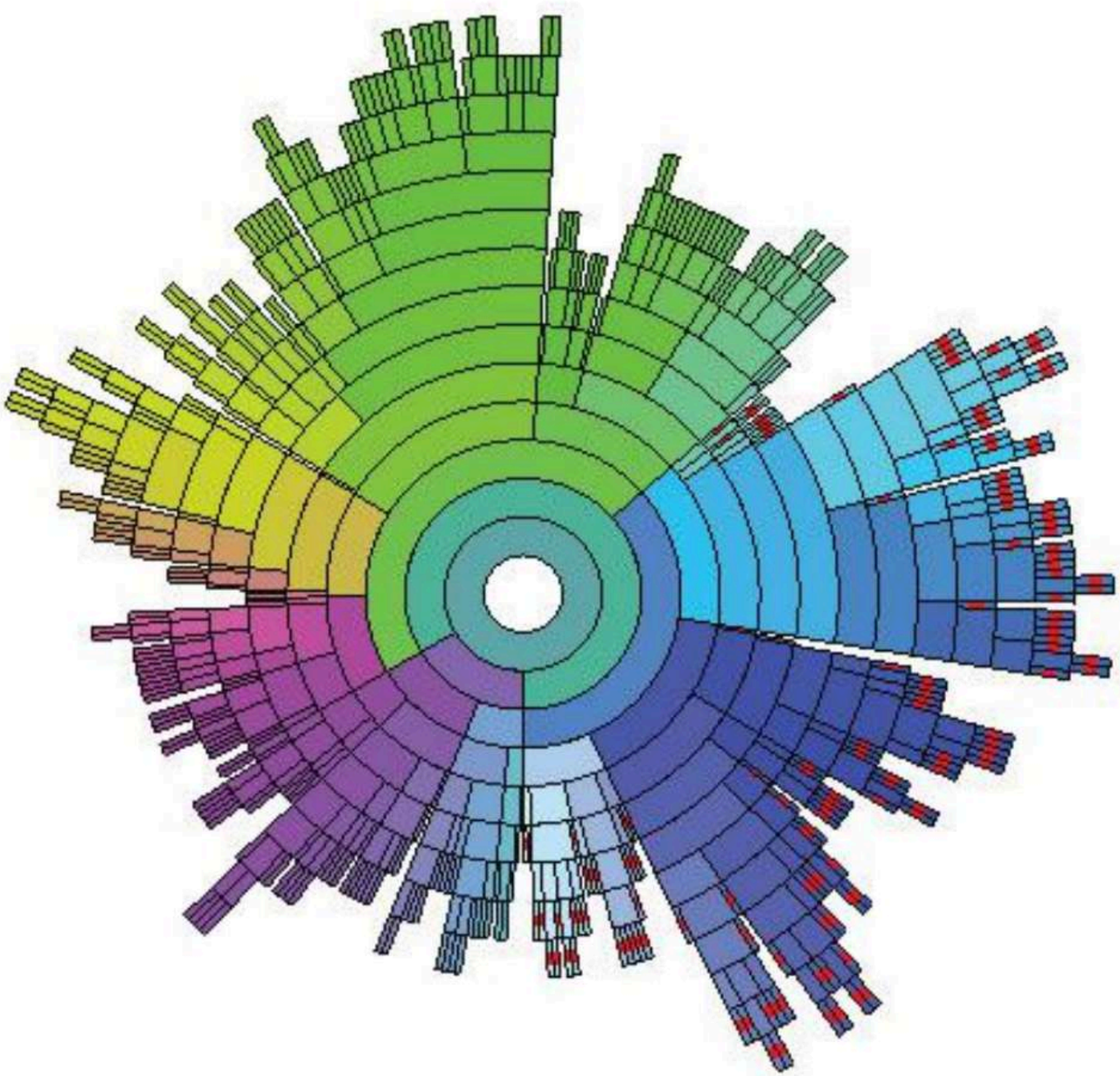


Selection of Data Points

#6744

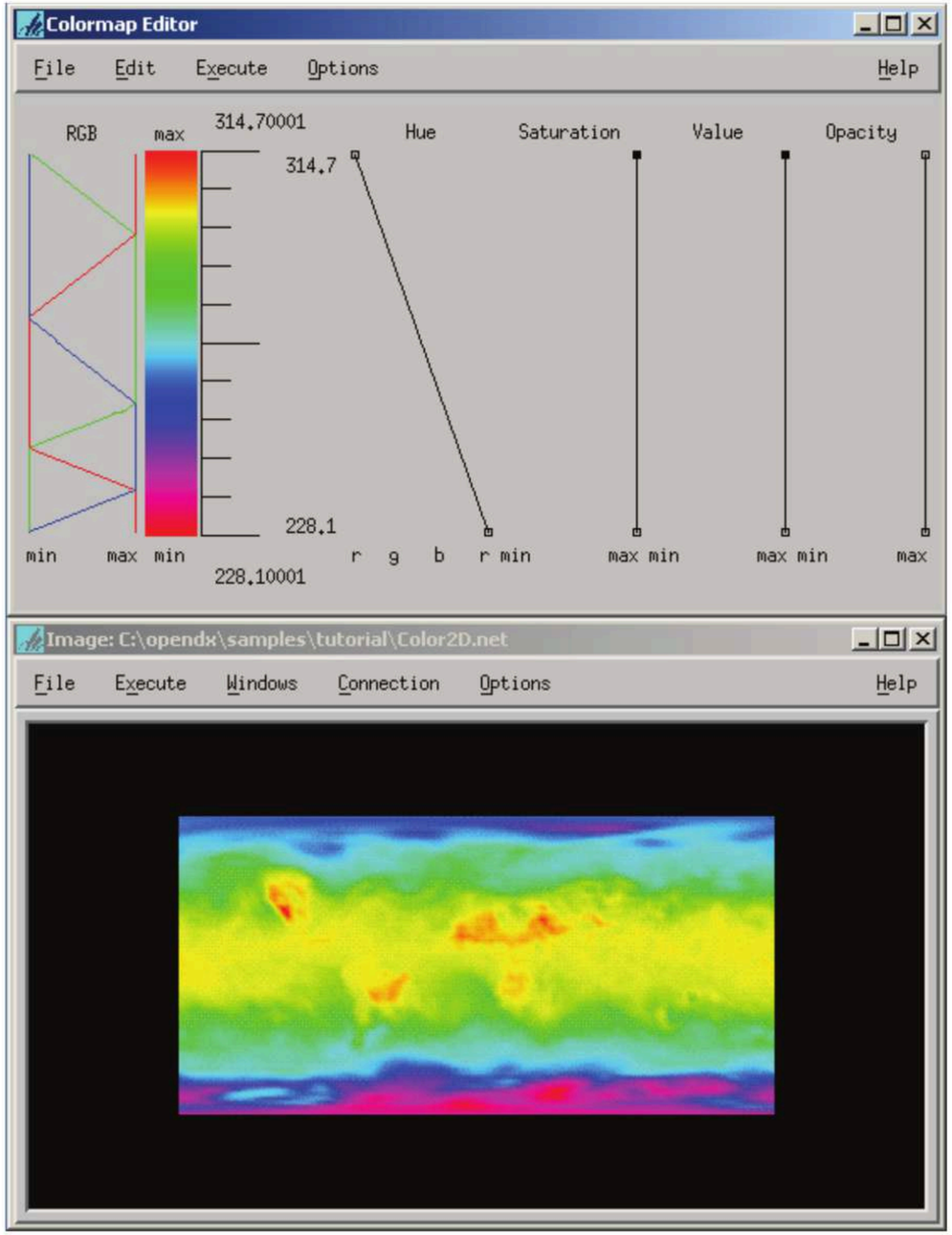


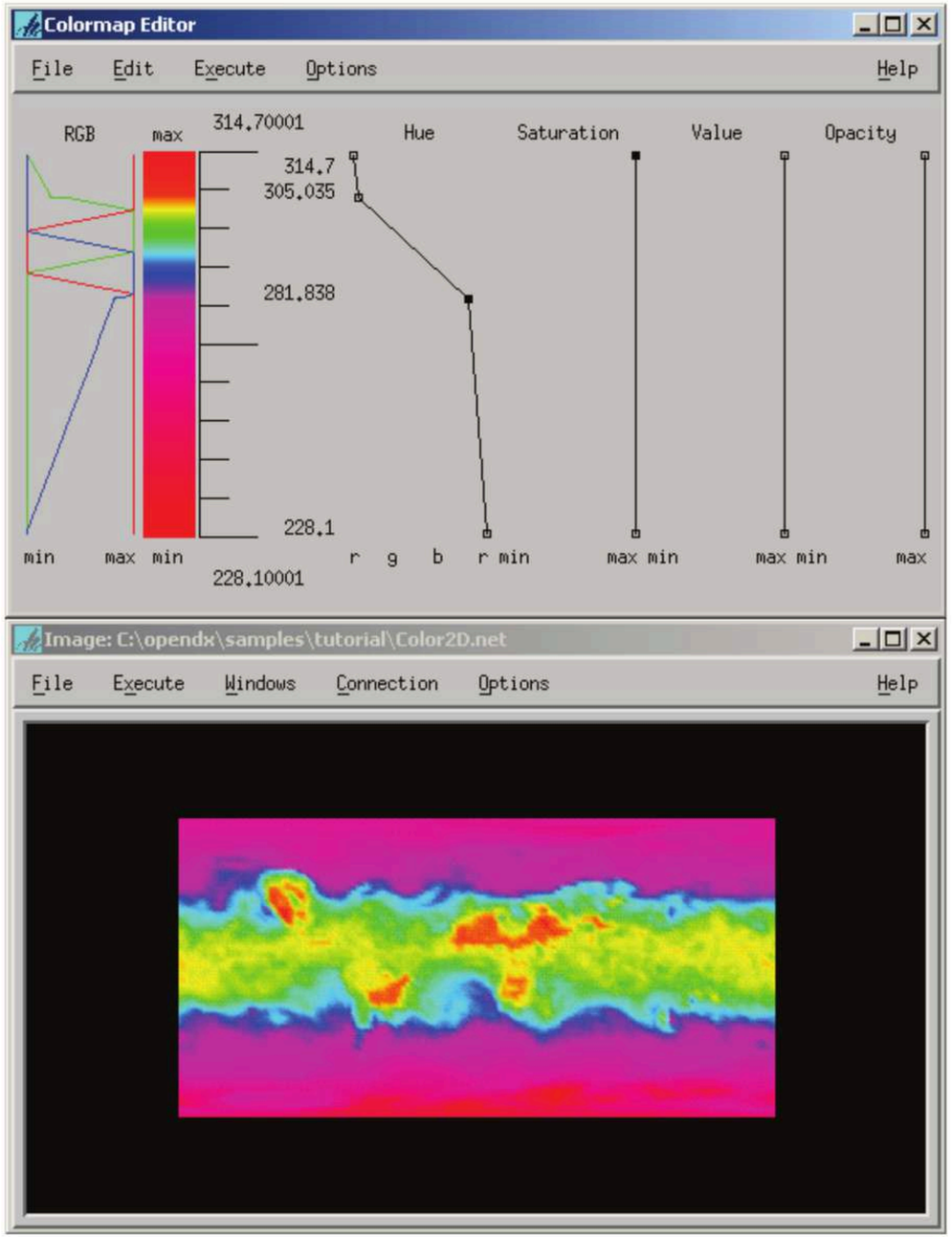




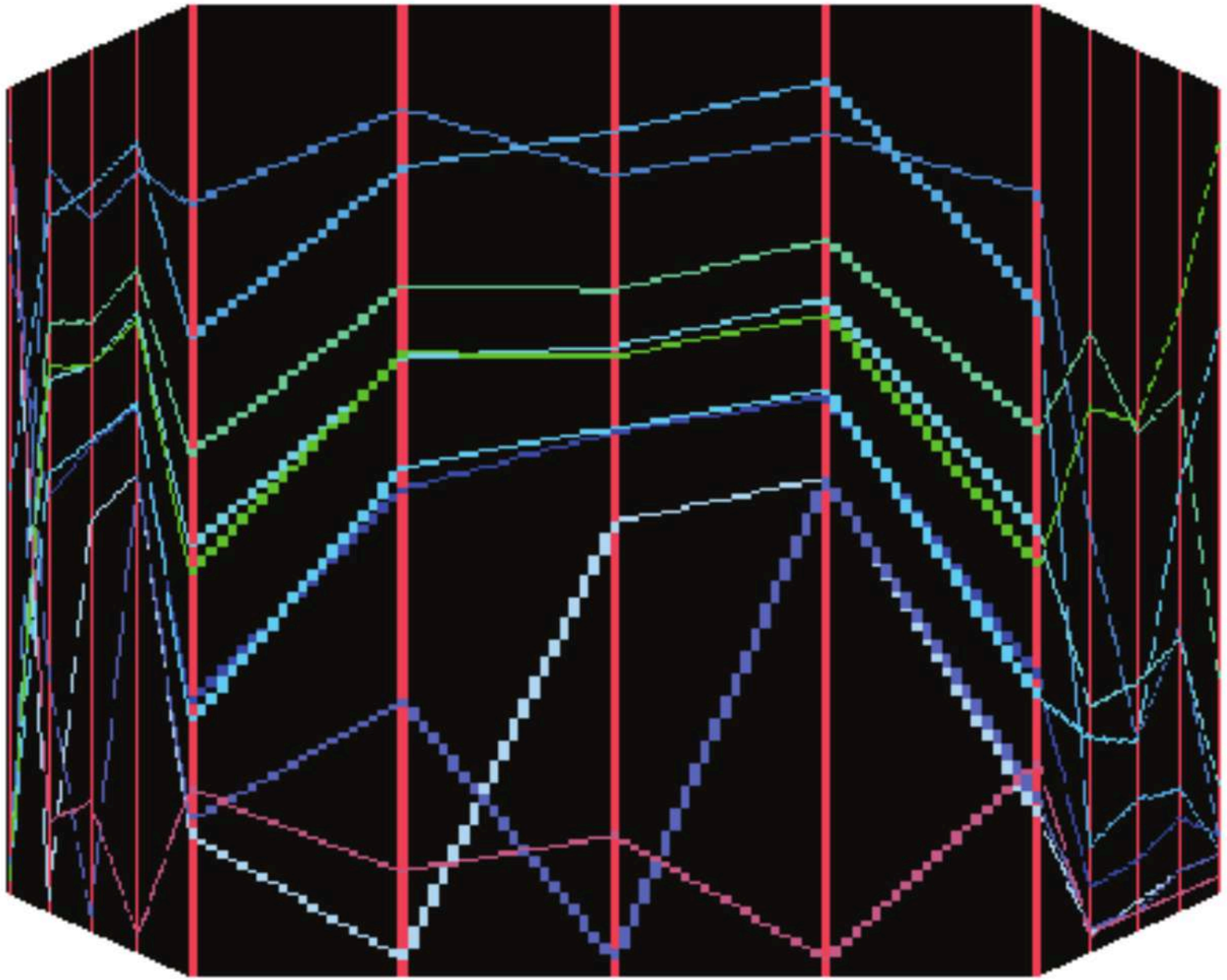
Selection of nodes in a hierarchy via InterRing. Nodes with a red stripe in them have been selected via a user-specified query, rather than one node at a time.

#6744

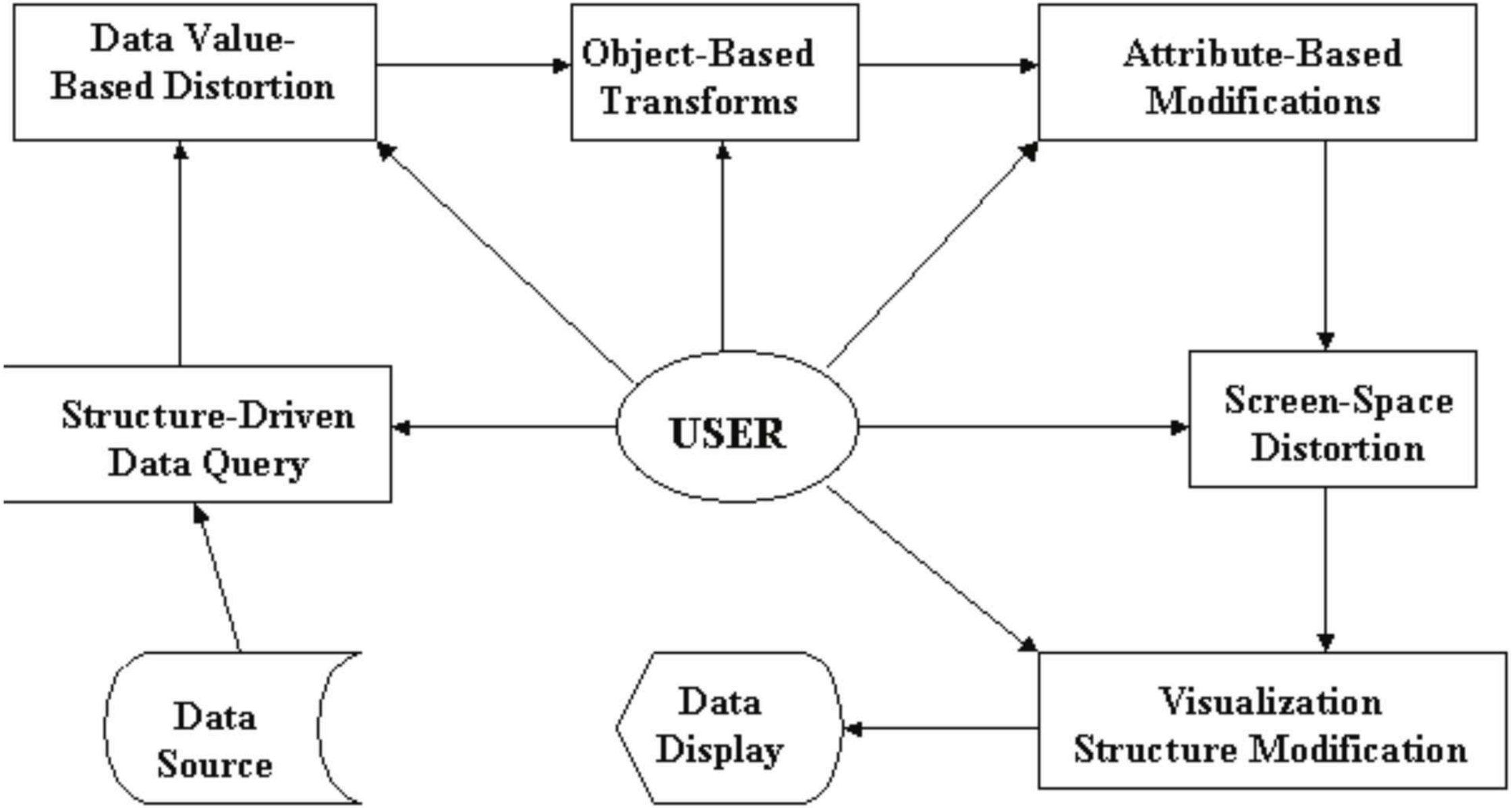




Attribute-based distortion modifies one or more attributes of the graphical objects used to depict the data



Object-based techniques distort an object upon which data has been projected.

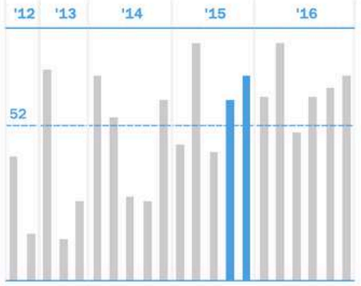

Data Value-
Based Distortion
Object-Based
Transforms
Attribute-Based
Modifications
Structure-Driven
Data Query
USER
Screen-Space
Distortion
Data
Source
Data
Display
Visualization
Structure Modification

Dashboard

#1151

Course Metrics

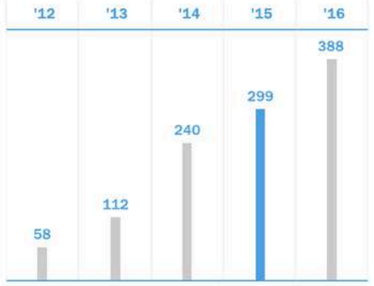
Students



1097

Total students in five years

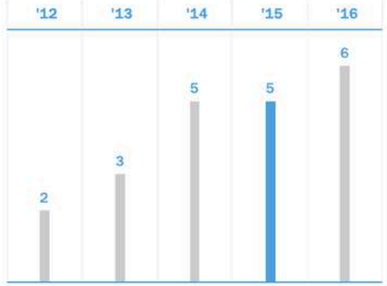
Enrollments



687

Total students in 2015-2016

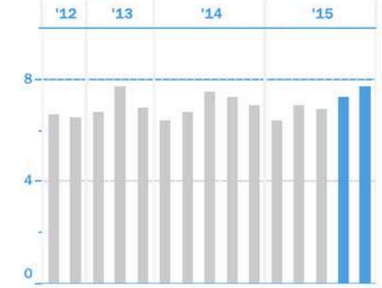
Classes



21

Total classes in five years

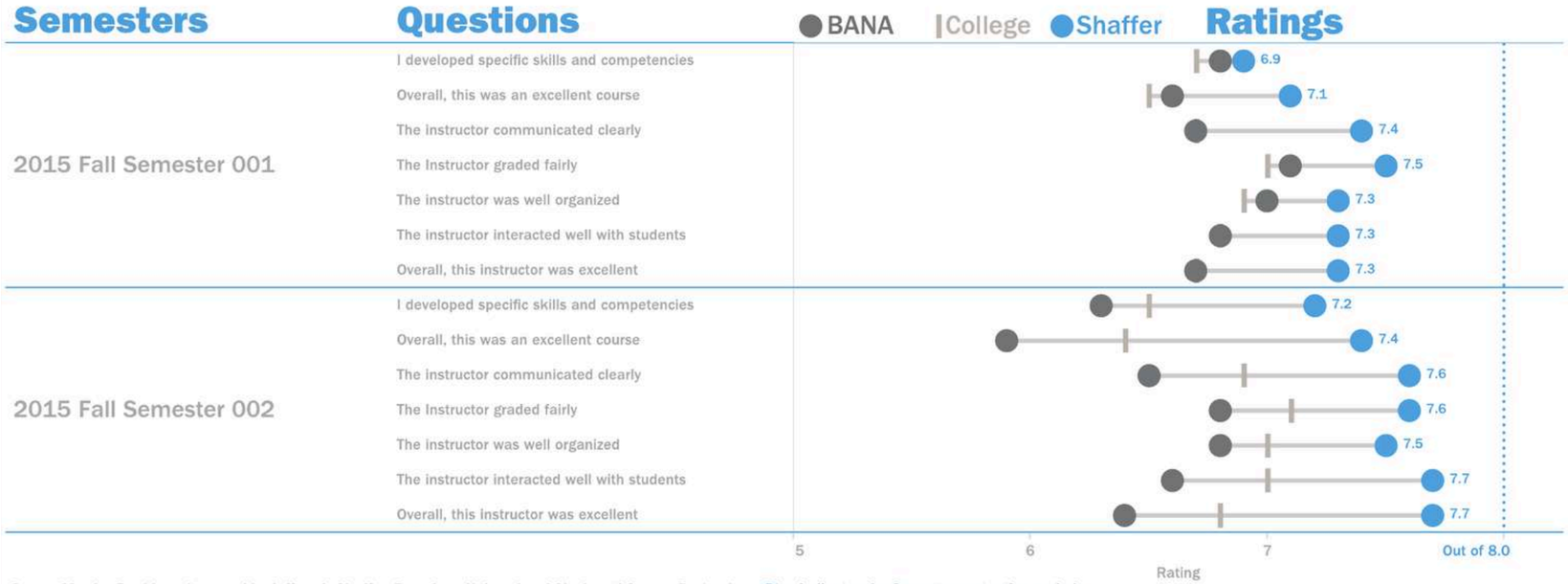
Ratings



7.7 of 8

Most Recent Instructor Rating (out of 8.0)

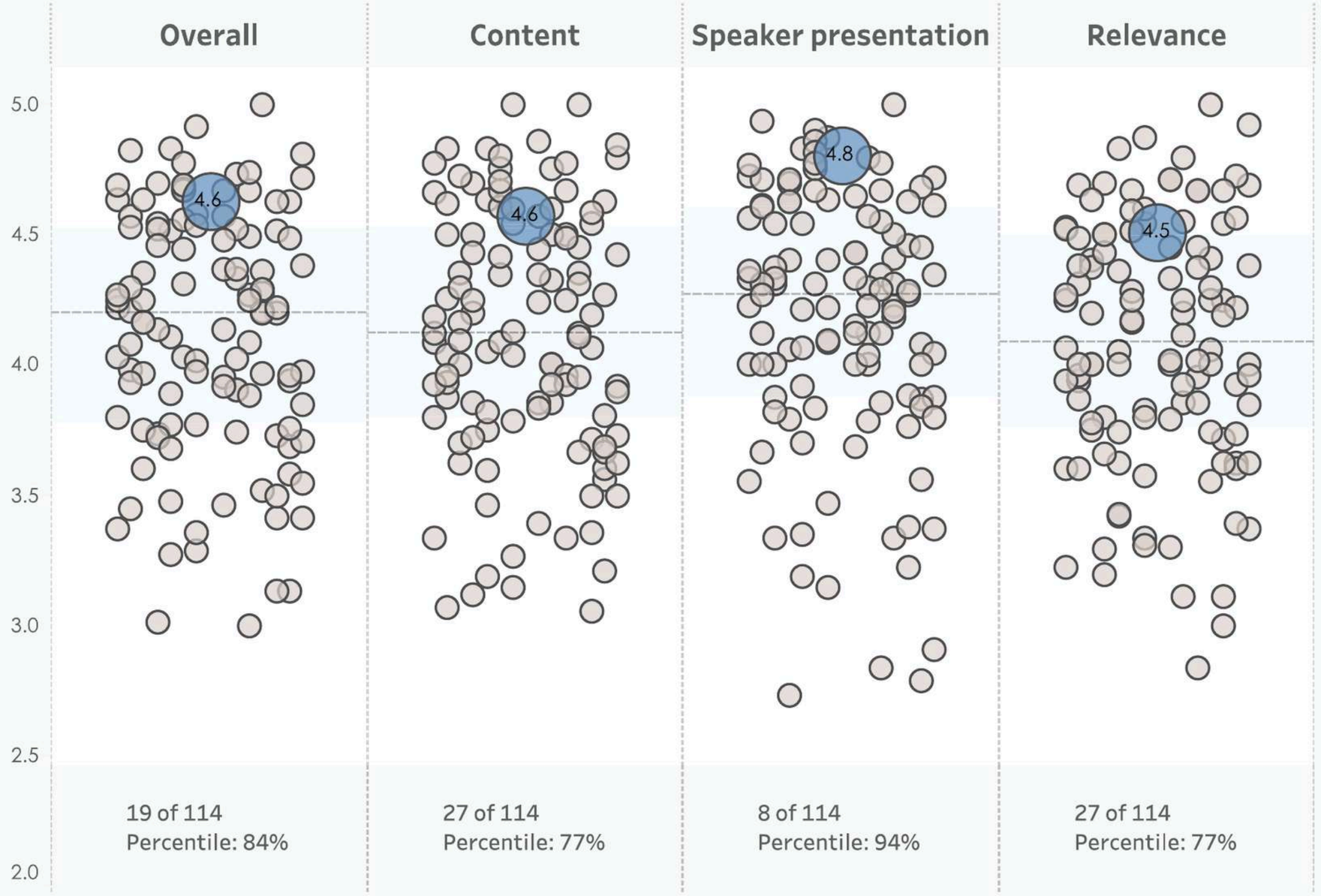
Semesters / Questions / Ratings



Course Metrics Dashboard created by Jeffrey A. Shaffer. Data from University of Cincinnati Course Evaluations. Blue indicates the 2 most recent rating periods.

Speaker Ratings Comparison

Speaker 317 compared with all other speakers



Enter Speaker ID

317

Minimum Session Count

5

Resize by response count

No

Selected

All others

Median

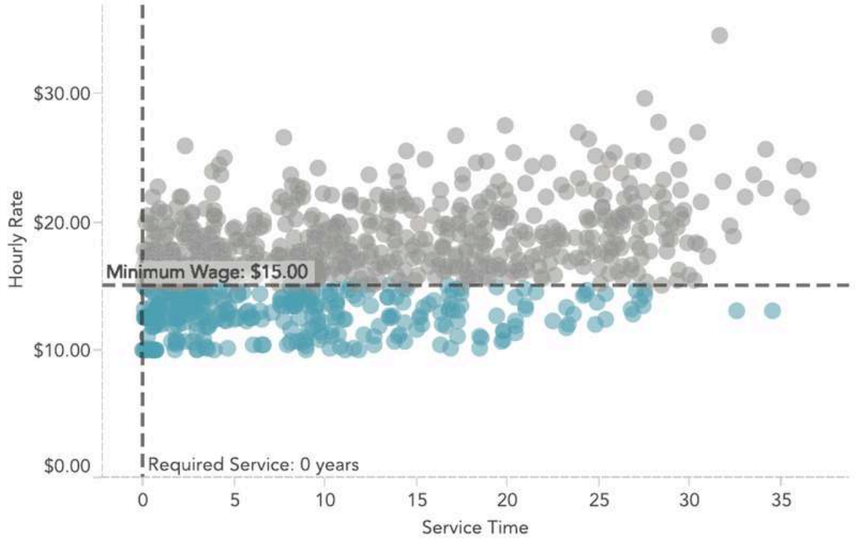
Upper / lower quartile

What-If Analysis: Impact of Minimum Wage

Proposed Minimum Wage: $15.00

Required Service: 0

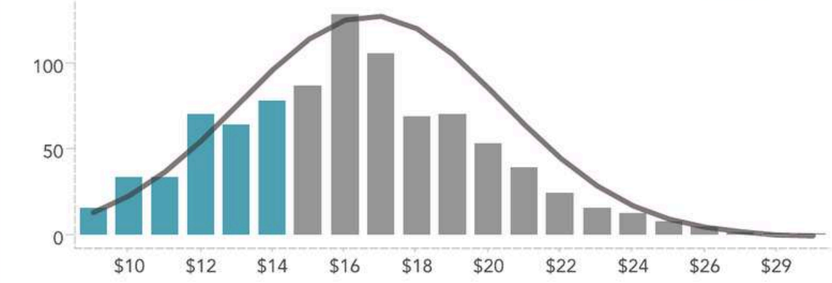
Below	Above
296 (32.1%)	625 (67.9%)



	Dollar Impact of Minimum Wage: $1,788,805	Employees Below Minimum Wage: 296
Services	$812,378	131
Facilities	$730,562	93
Marketing	$84,479	23
Logistics	$50,630	15
Supply Chain	$37,987	13
Legal	$27,191	4
Operations	$12,265	3
Customer Service	$10,923	4
Information Technology	$8,760	3
Human Resources	$7,539	4
Purchasing	$4,272	1
Research & Development	$1,818	2

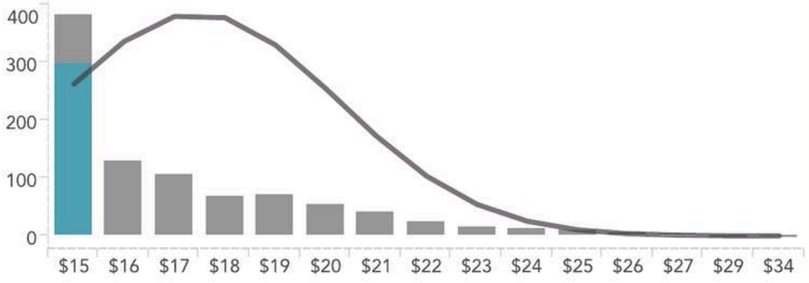
Current Distribution

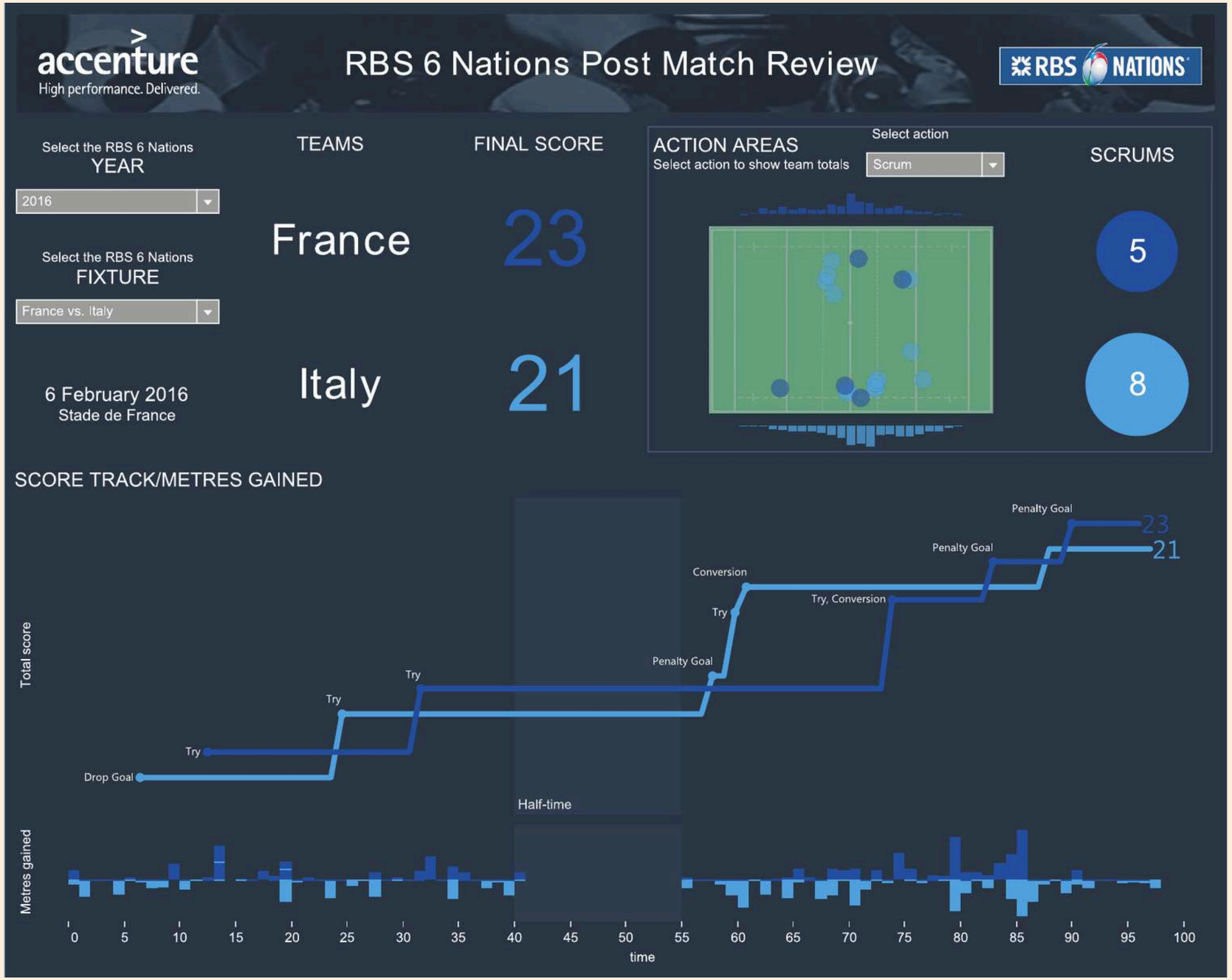
Average Hourly Rate: $16.72



Distribution with Minimum Wage

Average Hourly Rate: $17.45




accenture
High performance. Delivered.
RBS 6 Nations Post Match Review
RBS NATIONS
Select the RBS 6 Nations
YEAR
2016
Select the RBS 6 Nations
FIXTURE
France vs. Italy
6 February 2016
Stade de France
TEAMS
FINAL SCORE
France
23
Italy
21
ACTION AREAS
Select action to show team totals
Select action
Scrum
SCRUMS
5
8
SCORE TRACK/METRES GAINED
Total score
Drop Goal
Try
Try
Try
Penalty Goal
Try
Conversion
Try, Conversion
Penalty Goal
Penalty Goal
23
21
Half-time
Metres gained
0
5
10
15
20
25
30
35
40
45
50
55
60
65
70
75
80
85
90
95
100
time

Website Analytics

All data from August 1, 2015 through July 15, 2016

data + science
= transforming data to insight

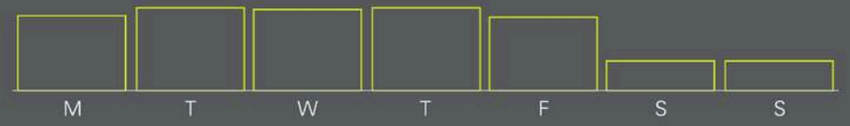
DATAPLUSSCIENCE.COM

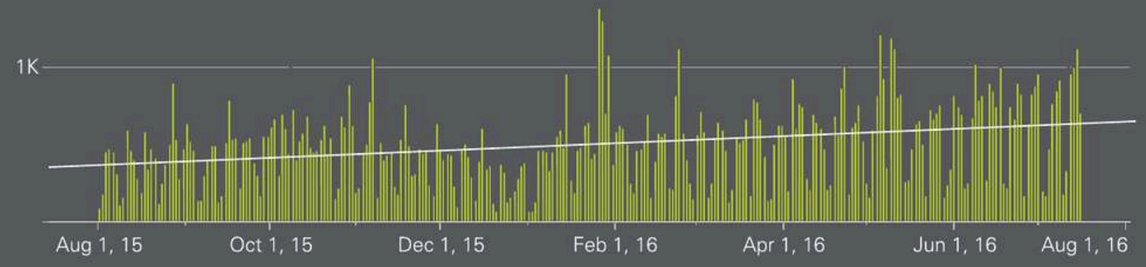
174,828
pageviews

81,938
users

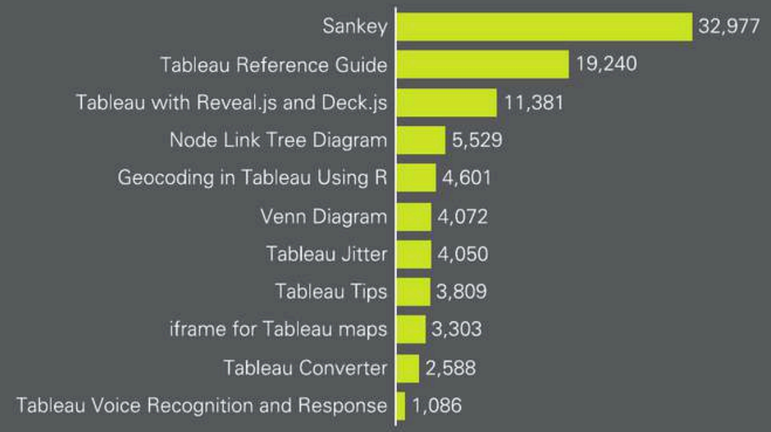
32
blog posts

Daily pageviews

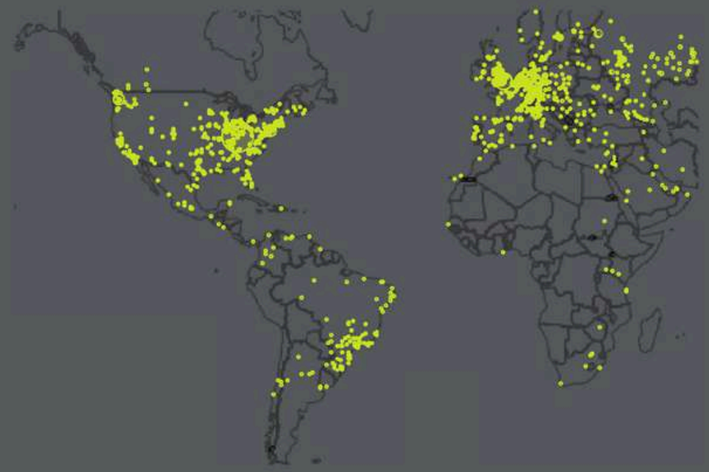




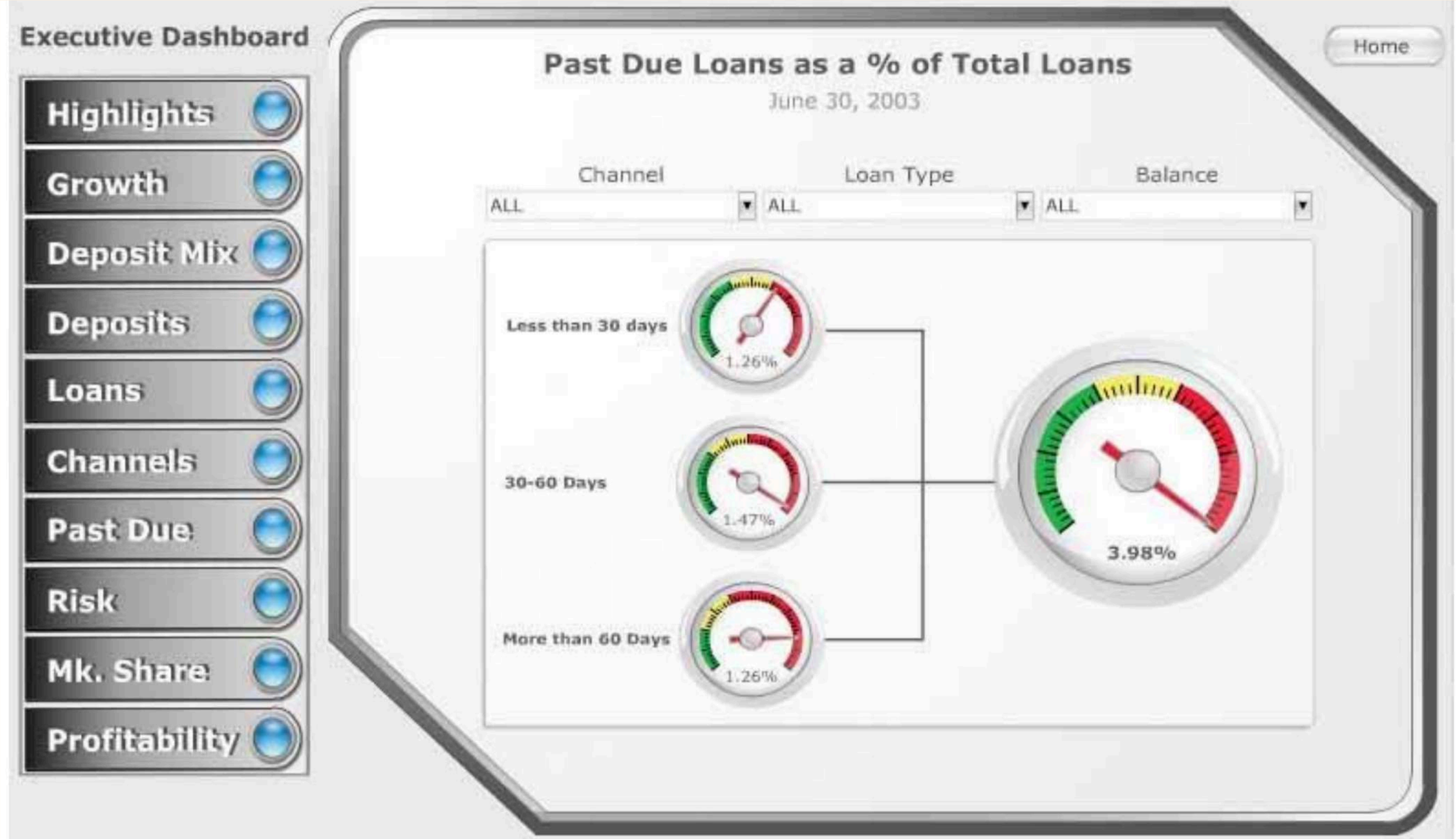
Most Visited Topics
(pageviews)

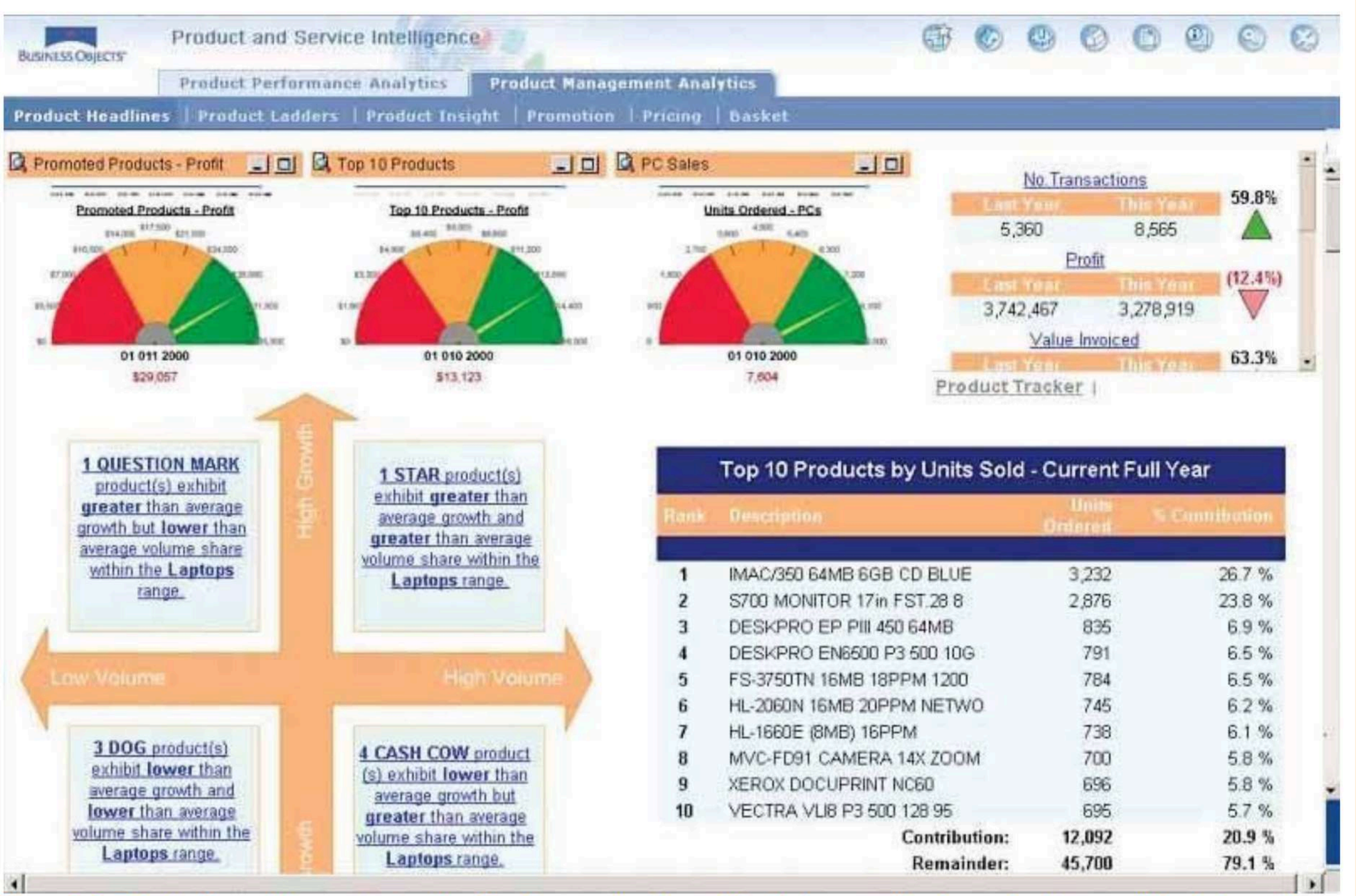


Location of Visitors



#1151


Executive Dashboard
Highlights
Growth
Deposit Mix
Deposits
Loans
Channels
Past Due
Risk
Mk. Share
Profitability
Home
Past Due Loans as a % of Total Loans
June 30, 2003
Channel
ALL
Loan Type
ALL
Balance
ALL
Less than 30 days
1.26%
30-60 Days
1.47%
More than 60 Days
1.26%
3.98%


Product and Service Intelligence
Product Performance Analytics
Product Management Analytics
Product Headlines | Product Ladders | Product Insight | Promotion | Pricing | Basket
Promoted Products - Profit
Top 10 Products
PC Sales
Promoted Products - Profit
01 011 2000
$29,057
Top 10 Products - Profit
01 010 2000
$13,123
Units Ordered - PCs
01 010 2000
7,604
No Transactions
Last Year
This Year
5,360
8,565
59.8%
Profit
Last Year
This Year
3,742,467
3,278,919
(12.4%)
Value Invoiced
63.3%
Product Tracker
1 QUESTION MARK product(s) exhibit greater than average growth but lower than average volume share within the Laptops range.
1 STAR product(s) exhibit greater than average growth and greater than average volume share within the Laptops range.
3 DOG product(s) exhibit lower than average growth and lower than average volume share within the Laptops range.
4 CASH COW product (s) exhibit lower than average growth but greater than average volume share within the Laptops range.
High Growth
Low Volume
High Volume
Top 10 Products by Units Sold - Current Full Year
Rank
Description
Units Ordered
% Contribution
1 IMAC/350 64MB 6GB CD BLUE 3,232 26.7 %
2 S700 MONITOR 17in FST.28 8 2,876 23.8 %
3 DESKPRO EP PIII 450 64MB 835 6.9 %
4 DESKPRO EN6500 P3 500 10G 791 6.5 %
5 FS-3750TN 16MB 18PPM 1200 784 6.5 %
6 HL-2060N 16MB 20PPM NETWO 745 6.2 %
7 HL-1660E (8MB) 16PPM 738 6.1 %
8 MVC-FD91 CAMERA 14X ZOOM 700 5.8 %
9 XEROX DOCUPRINT NC60 696 5.8 %
10 VECTRA VLI8 P3 500 128 95 695 5.7 %
Contribution: 12,092 20.9 %
Remainder: 45,700 79.1 %

869
October Units
7,822
YTD Units
0.26%
Returns Rate

Industry best practice
Company average
1:15
1:00
1:45
:45
2:30
:30
3:30
:15
4:45
0
6:00
Average call length

CELEQUEST™

Activity Server | Account Setting | Help

Signed in as zaphod | Sign Out

Navigation Tree

Dashboards

- Dashboards
  - All Dashboards
    - Quality Yield Analysis
  - Bookmarked Dashboards

Activity Dashboards | Quality Yield Analysis

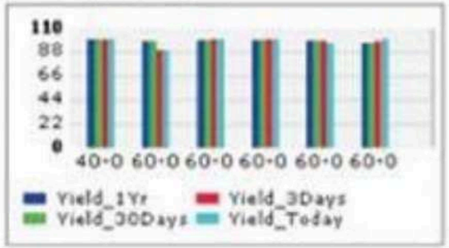
Edit Dashboard | Save As | Add Bookmark

Active Alert Messages (Delete)

Subject	Importance	Alert Activated
8/16/2003 Yield Drop in ESS on 60-00...	Normal	03/15/2004 17:10:08
8/16/2003 Yield Drop on 60-0001663 ...	High	03/15/2004 17:10:08
8/13/2003 Yield Drop in ESS on 60-0002000...	Normal	03/15/2004 17:10:01
8/13/2003 Critical Component Failure (60-0...	High	03/15/2004 17:10:00
8/13/2003 Impacted Boards for 11-0000040...	High	03/15/2004 17:09:59
8/1/2003 Yield Drop in ESS on 60-000...	Normal	03/15/2004 17:09:46

Detail View

Board Yield Barchart

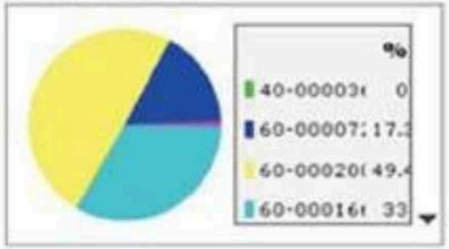


Detail View

Board Yield Change Barchart

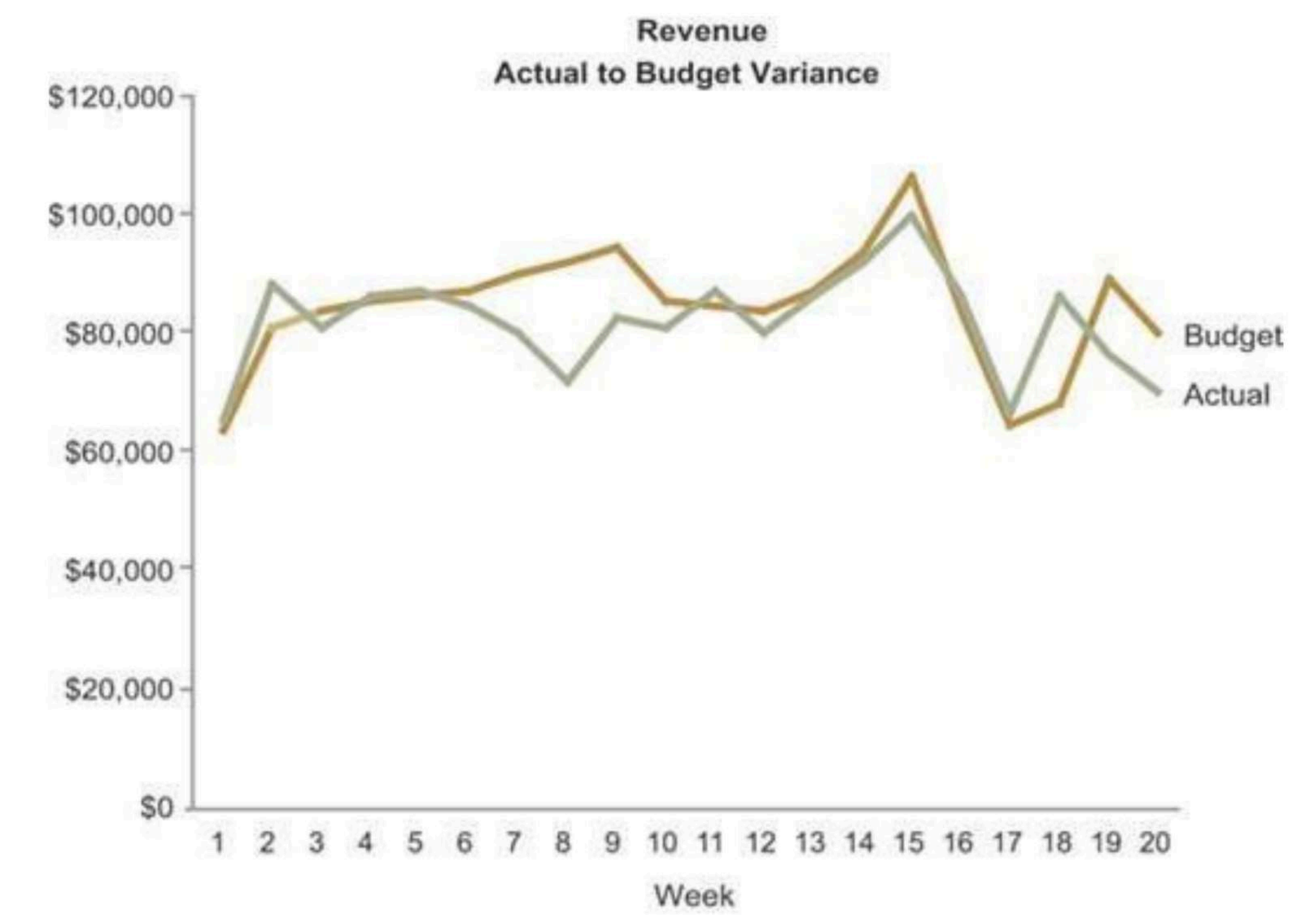
Detail View

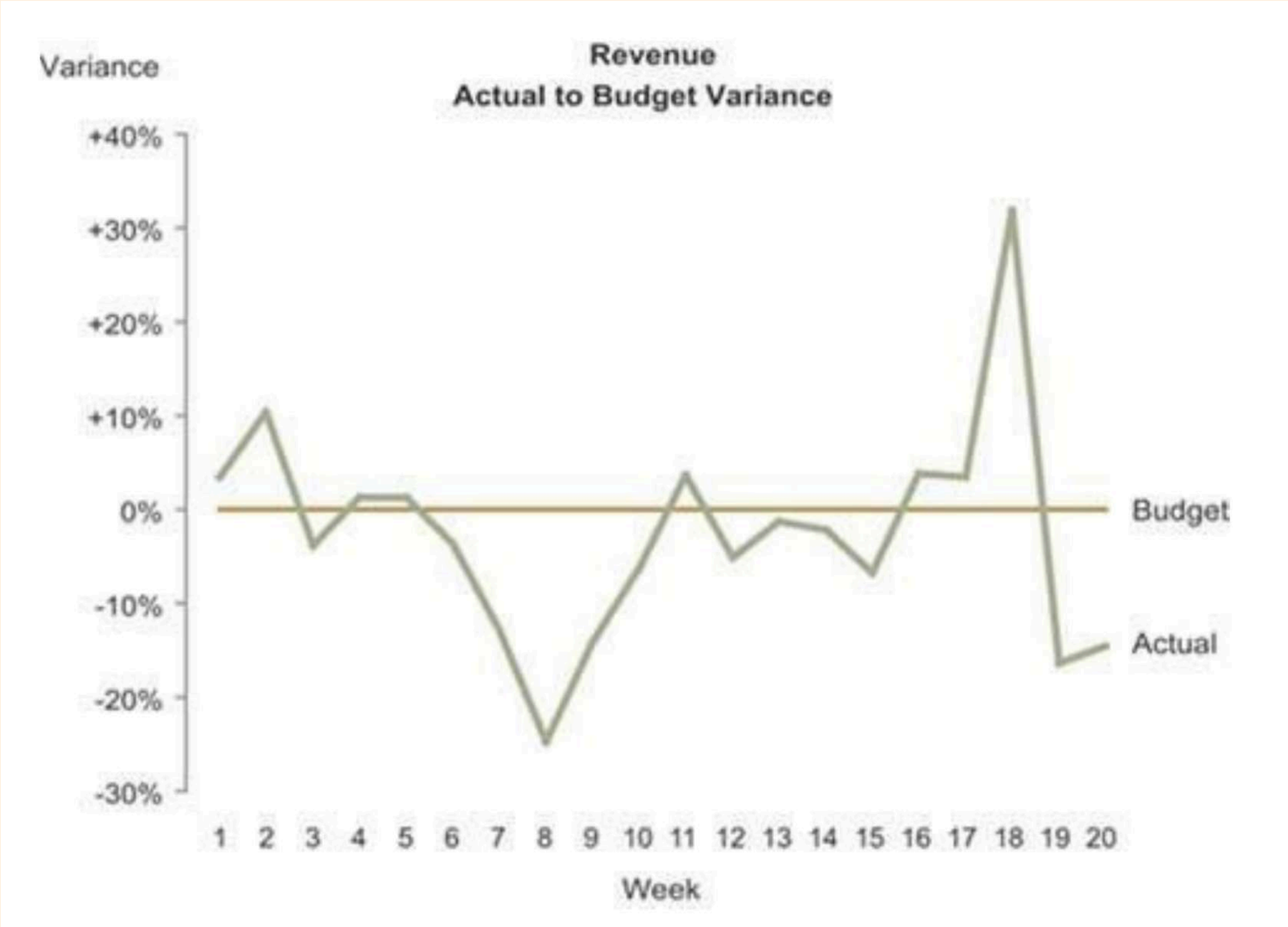
Tests Breakdown Pie

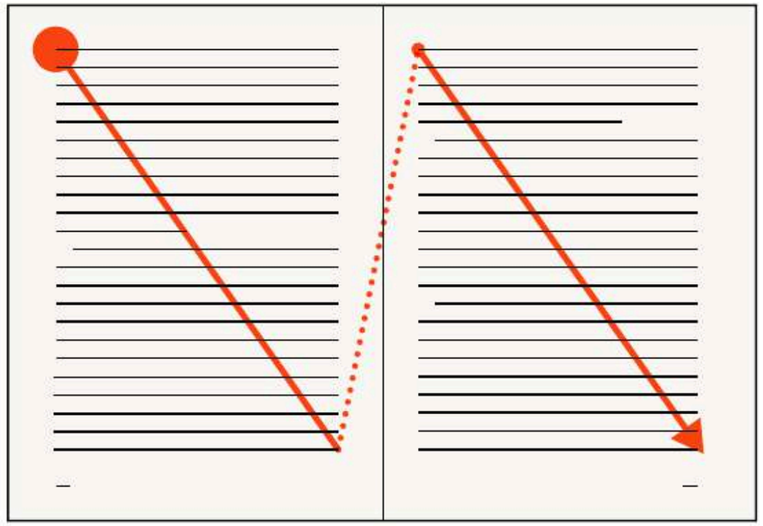


Board Yield Table Summary (Detail View)

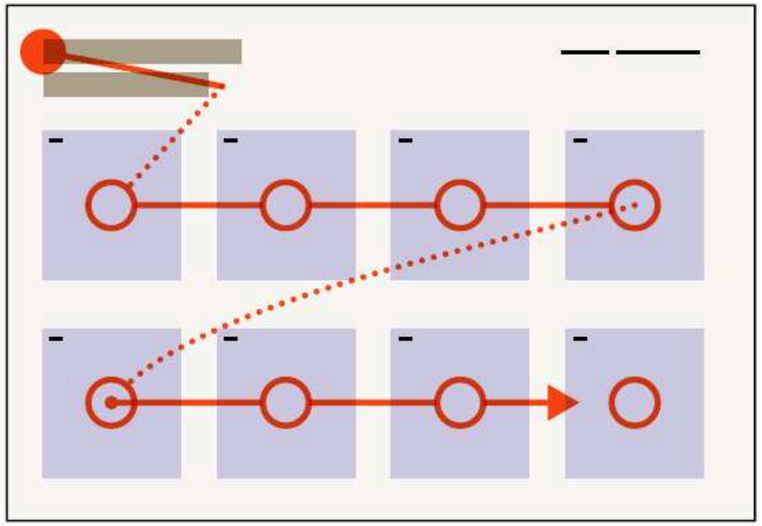
PRODUCT_NUM	PRODUCT_DESC	YIELD_TODAY	YIELD_...	YIELD_...	YIELD_...	YIELD...	YIELD_CHAN...	YIELD...
40-0000364-05	PCBA,EROS,AP7420	100.0000000000	100.0000	100.0000	100.0000	0.0000	0.0000000000	0.0000
60-0000720-01	ASSY,16 PORT CARD,SI,SW12000	89.4308943100	89.6000	98.0535	98.0535	-8.4535	-0.1691056900	-8.4535
60-0001624-06	ASSY,CP,FULL LENGTH	100.0000000000	100.0000	99.1549	99.1549	0.8451	0.0000000000	0.8451
60-0001663-03	ASSY, INNER BOX W/MB, SW3600	100.0000000000	100.0000	99.1111	99.1111	0.8889	0.0000000000	0.8889


Revenue
Actual to Budget Variance
$120,000
$100,000
$80,000
$60,000
$40,000
$20,000
$0
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
Week
Budget
Actual

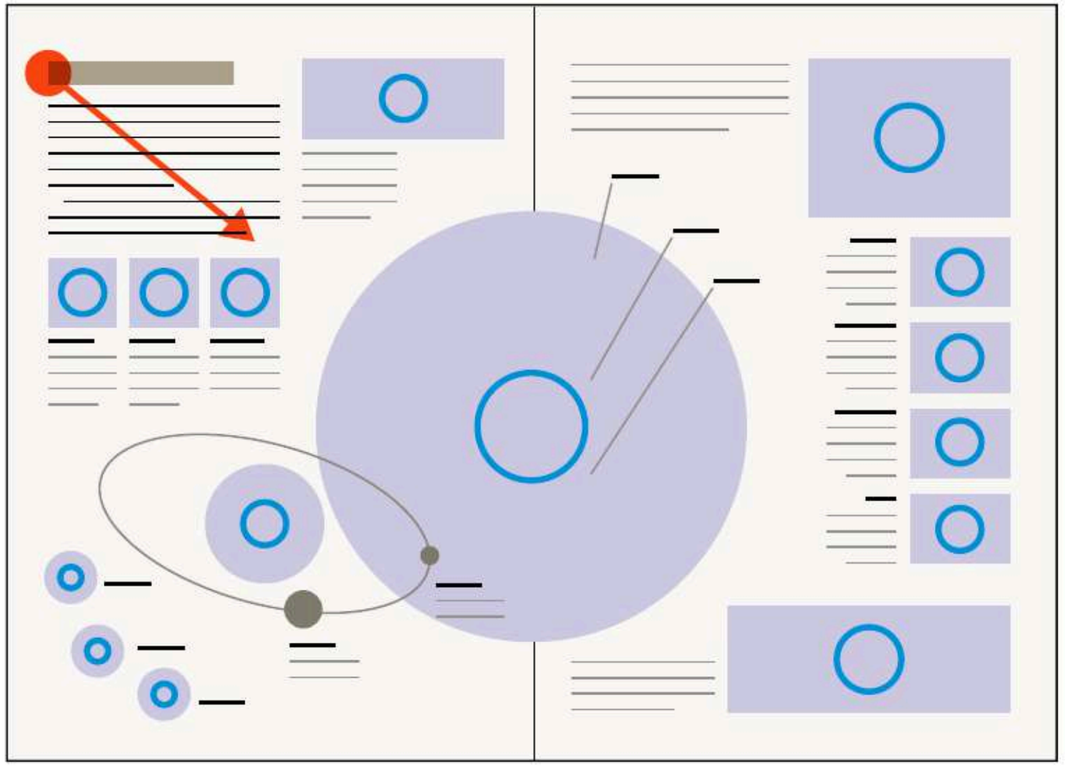

Revenue
Actual to Budget Variance
Variance
+40%
+30%
+20%
+10%
0%
-10%
-20%
-30%
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
Week
Budget
Actual

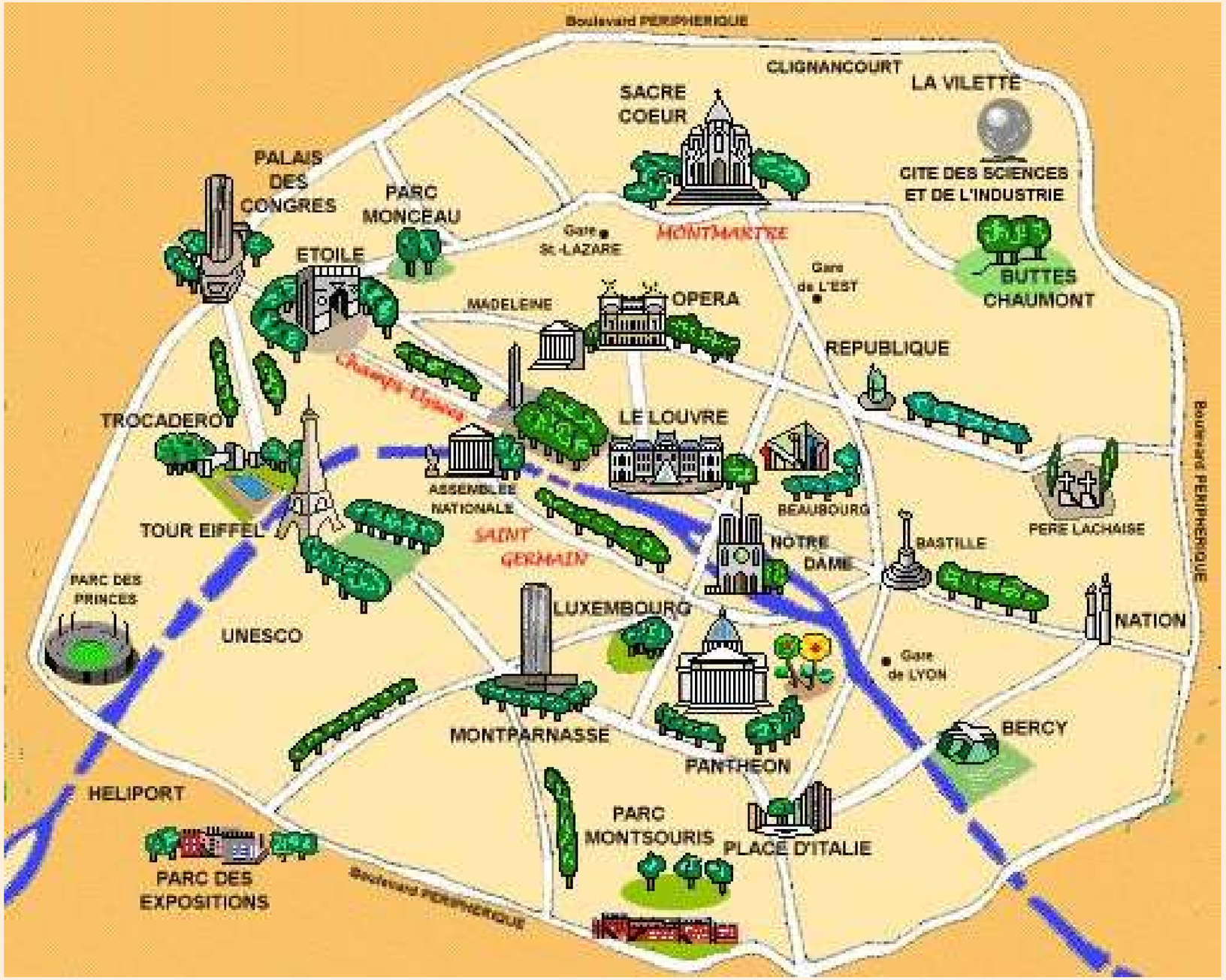


Prose

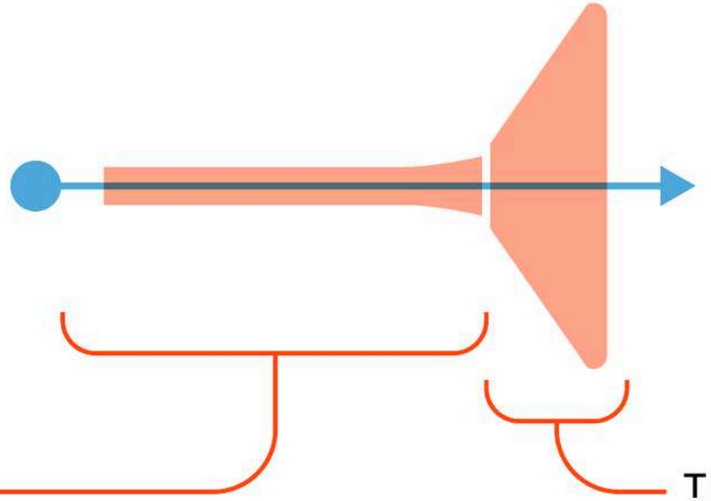


Step-by-step instruction



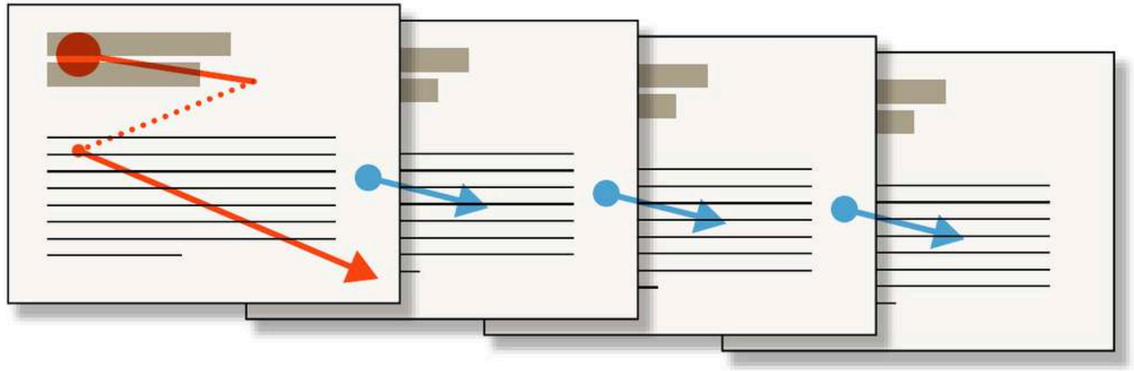

Boulevard PERIPHERIQUE
CLIGNANCOURT
LA VILETTE
SACRE COEUR
CITE DES SCIENCES ET DE L'INDUSTRIE
PALAIS DES CONGRES
PARC MONCEAU
Gare St-LAZARE
MONTMARTRE
ETOILE
Gare de L'EST
BUTTES CHAUMONT
MADELEINE
OPERA
REPUBLIQUE
Champs Elysées
TROCADERO
LE LOUVRE
ASSEMBLEE NATIONALE
BEAUBOURG
PERE LACHAISE
TOUR EIFFEL
SAINT GERMAIN
NOTRE DAME
BASTILLE
PARC DES PRINCES
LUXEMBOURG
NATION
UNESCO
Gare de LYON
MONTPARNASSE
BERCY
PANTHEON
HELIPORT
PARC MONTSOURIS
PLACE D'ITALIE
PARC DES EXPOSITIONS
Boulevard PERIPHERIQUE
Boulevard PERIPHERIQUE

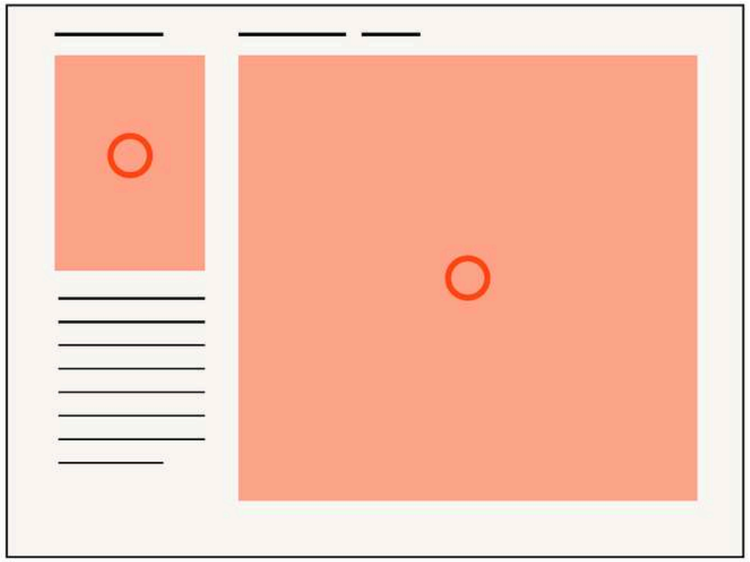
The Martini glass structure

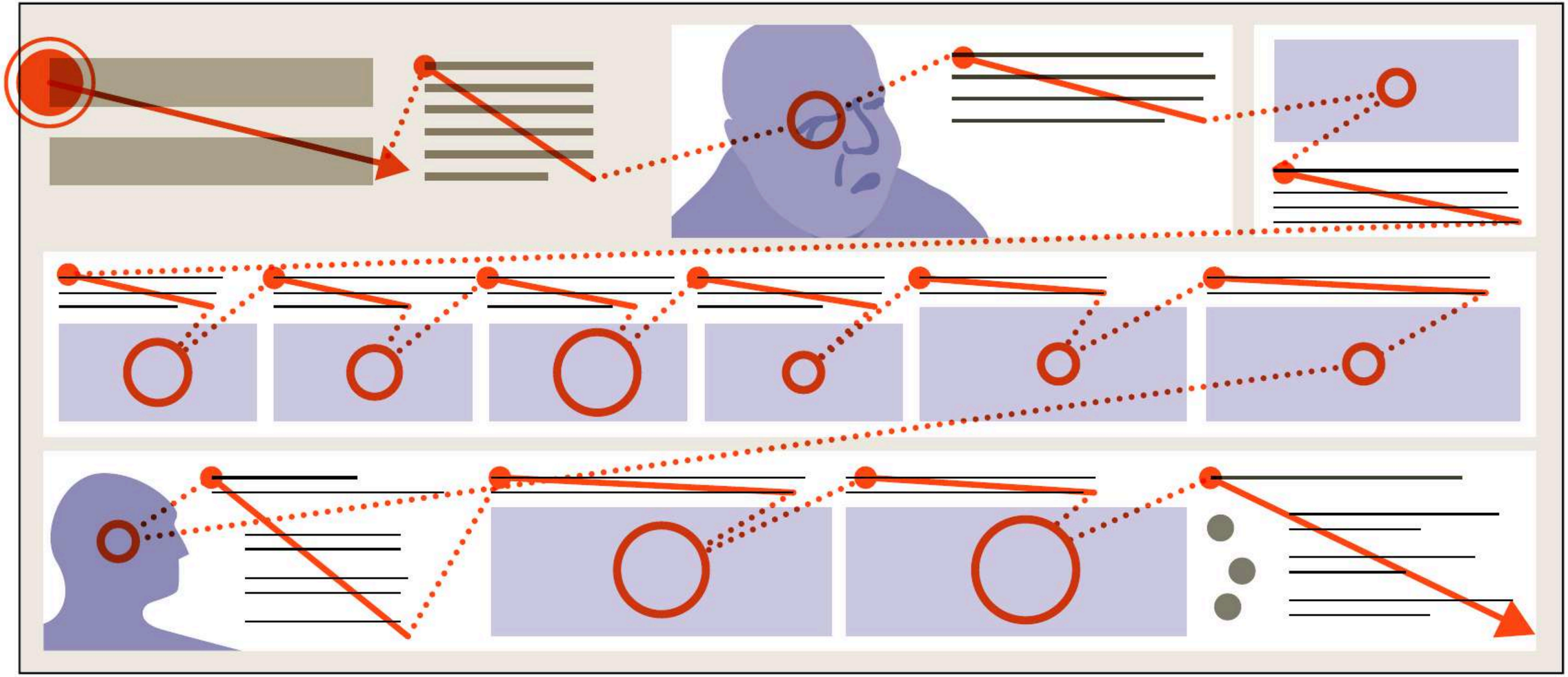


THE STEM: TIGHTLY CONTROLLED LINEAR NARRATIVE AS INTRODUCTION

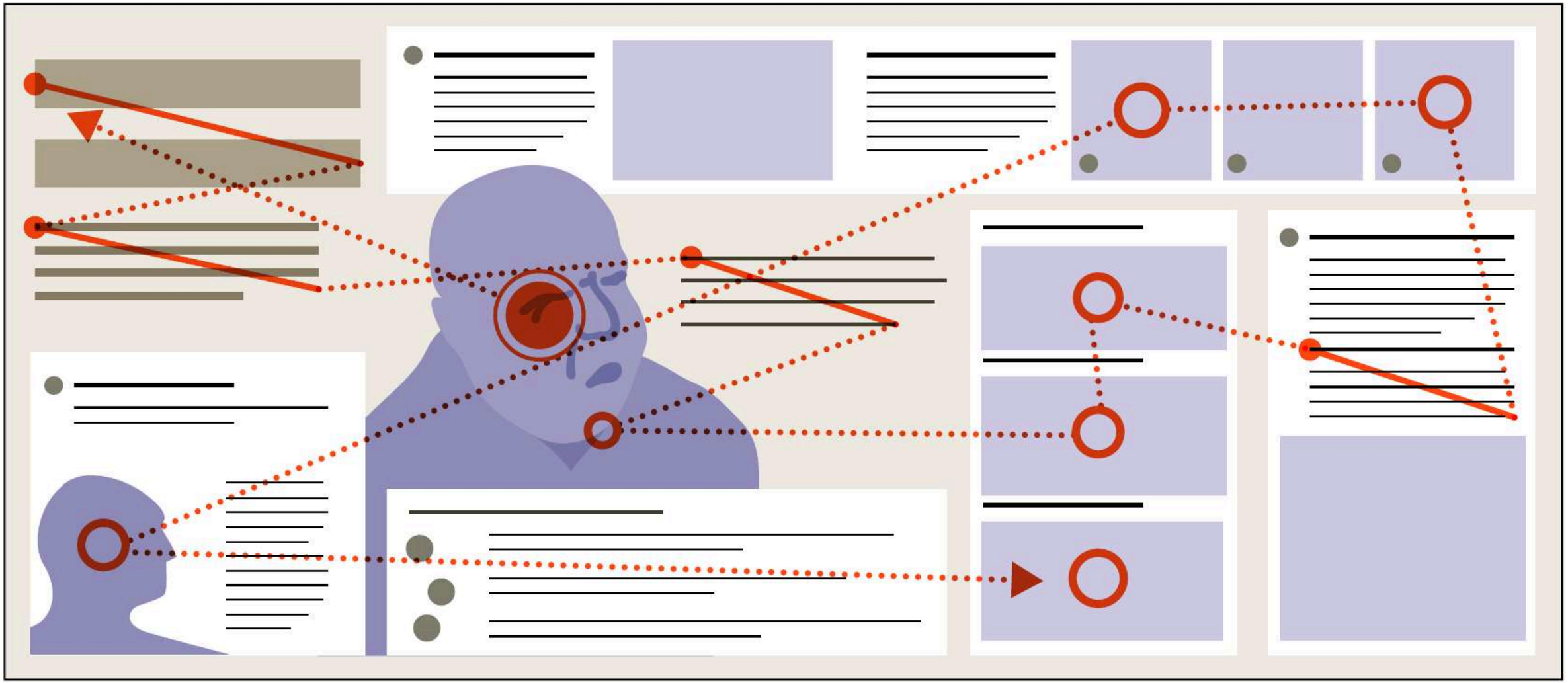
THE GLASS: THE READER IS FREE TO EXPLORE THE MATERIAL





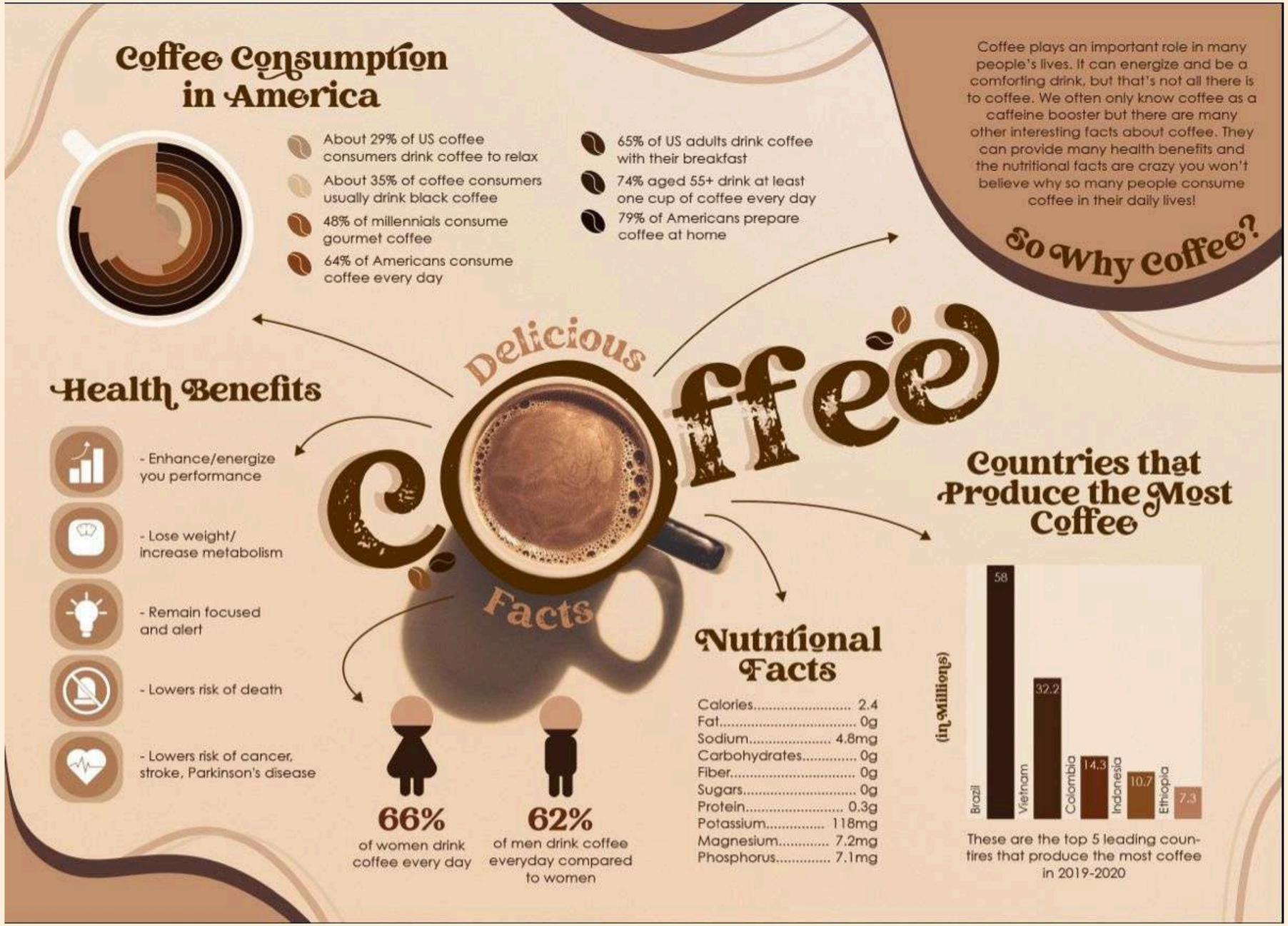


Serial layout—reading starts from the headline



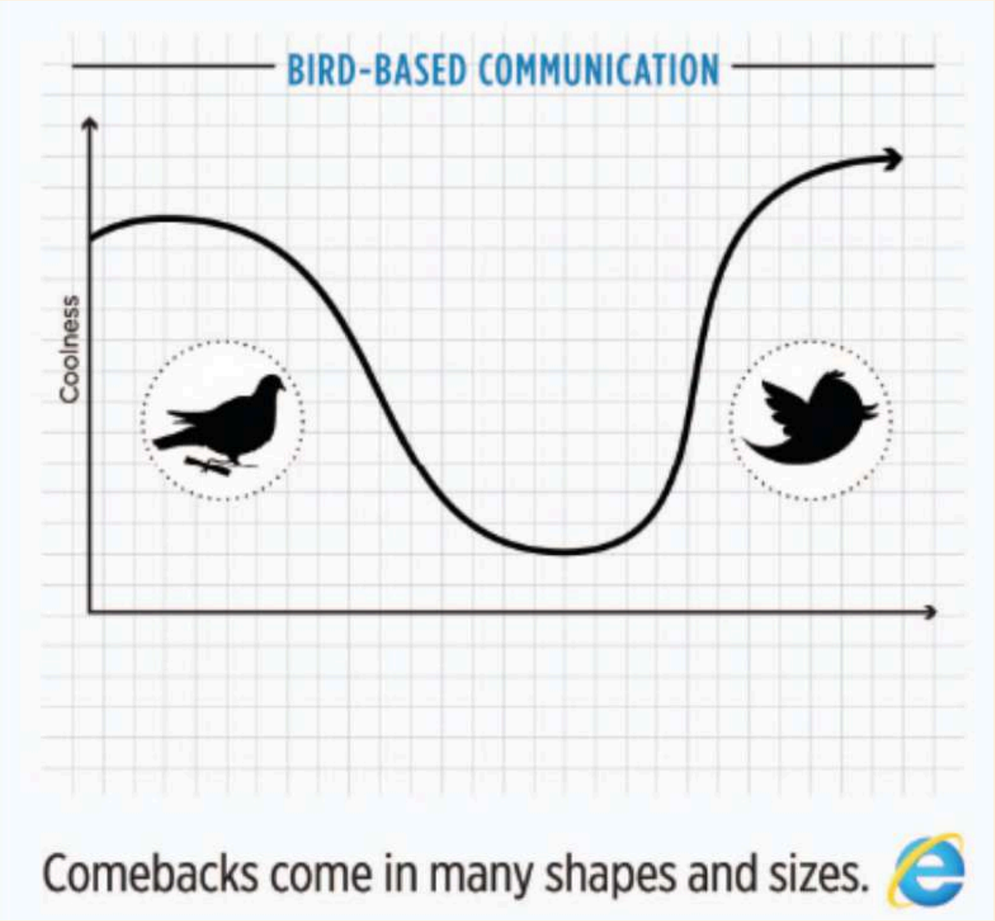
Radial layout—a central image acts as a focal point

Which kind of layout this visualization shows?



Which kind of layout this visualization shows?

Visual Storytelling



sam.aabjnus3.com

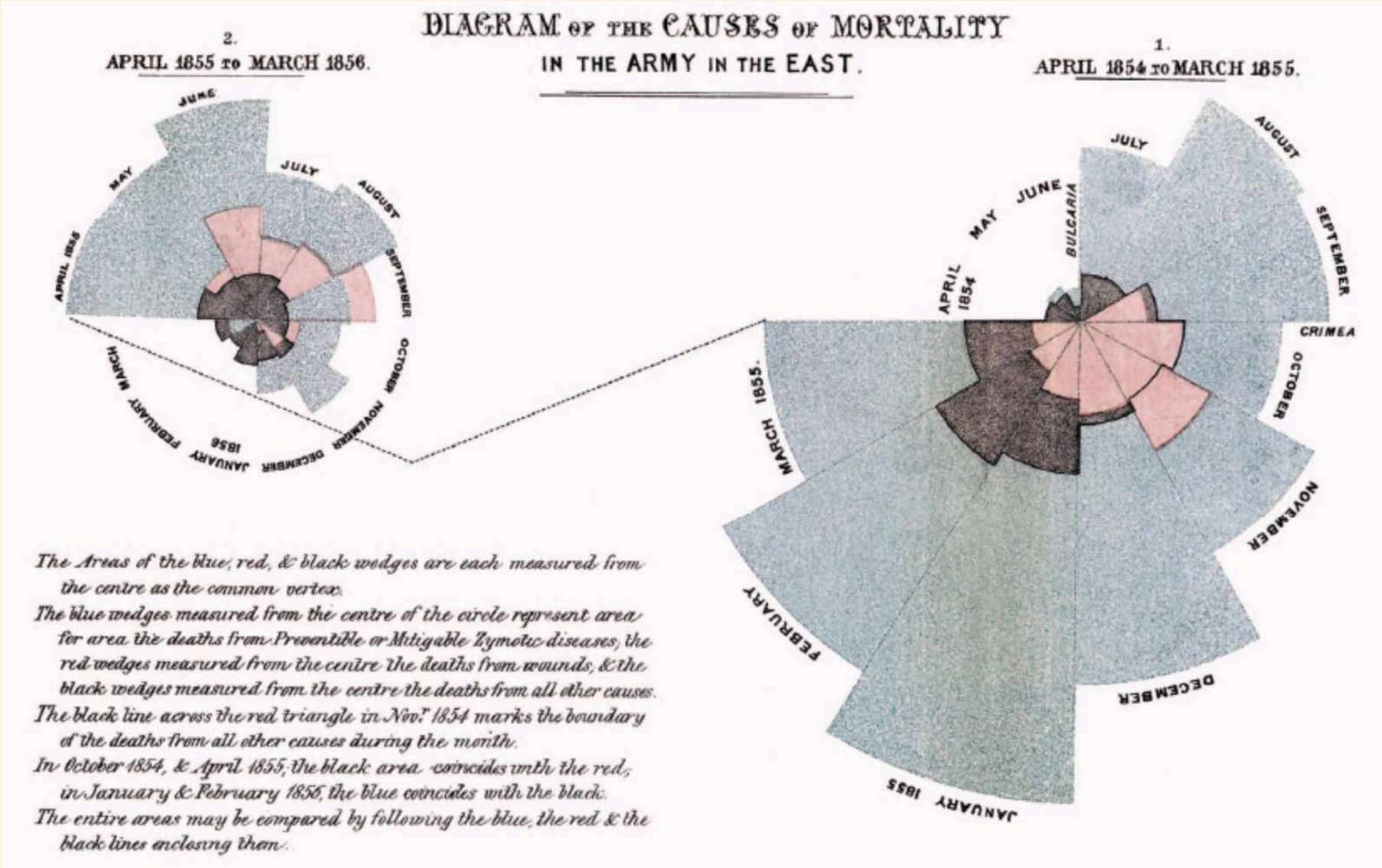
“The aim of the poet is to inform or delight, or to combine together, in what he says, both pleasure and applicability to life.

In instructing, be brief in what you say in order that your readers may grasp it quickly and retain it faithfully.

Superfluous words simply spill out when the mind is already full.

Horace

(Epistolas Ad Pisones De Ars Poetica)



Florence Nightingale

Show the causes of mortality of the British Army during the Crimean War. This was presented to Parliament, who had previously been unresponsive to concerns of health and hygiene of the troops, and brought about a new way of thinking about the spread of disease

TRUE COLORS

WHAT YOUR BRAND COLORS SAY ABOUT YOUR BUSINESS

COLOR MATTERS:

WHY SHOULD YOU CARE ABOUT YOUR BRAND COLORS?

Studies have shown that ***a product's color influences 60 to 80 percent of a customer's purchasing decision***, meaning color can make or break a product.

Consumers are acutely aware of ***whether or not a brand and logo color really connect.***

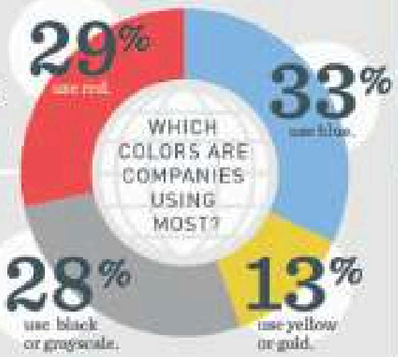
Color is the first thing a customer will notice about your logo.

It costs your company next to nothing to choose a color, ***but making the wrong decision could cost your company in the long run.***

INTEGRATE YOUR BRAND COLORS ACROSS THE BOARD—IN YOUR LOGO, LANDING PAGE, PRODUCT, AND MORE—TO ACHIEVE THE HIGHEST IMPACT.

THE TRUE COLORS OF THE WORLD'S TOP BRANDS

A study of the world's top 100 brands (determined by brand value) analyzed each brand's logo and found the following:



NUMBER of COLORS

95% use only one or two colors.

5% USE MORE THAN TWO COLORS

41% USE TEXT ONLY.

9% DON'T FEATURE THE COMPANY NAME AT ALL.

MAXIMUM REVENUE

WHAT CAN RPM DO FOR YOU?

Revenue Performance Management (RPM): is a revolutionary way of setting up your business to achieve maximum revenue. It involves your marketing and sales teams calling a truce and coming together to create new processes with the same goal in mind: generating revenue. Read on to learn what your peers say.

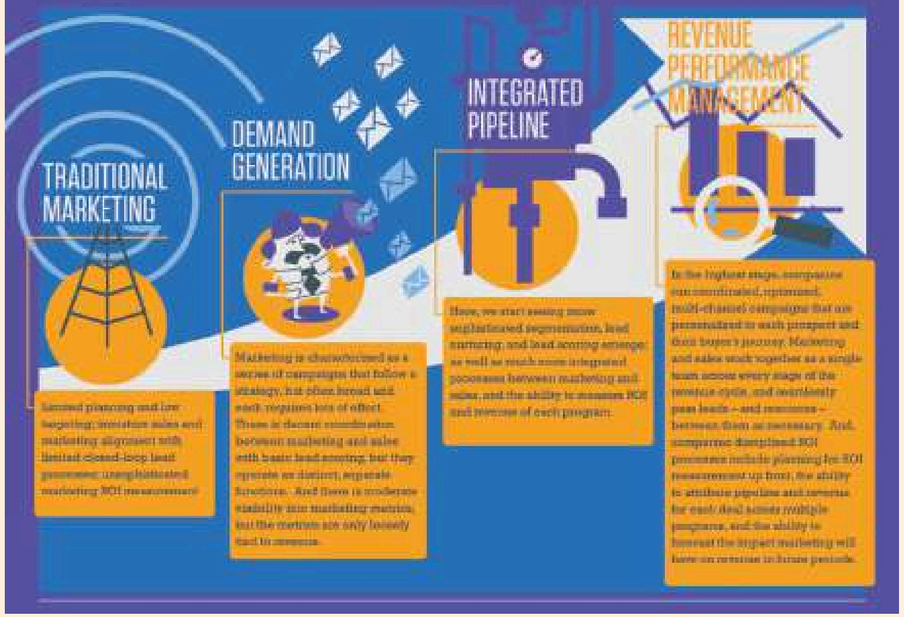
Consider this:

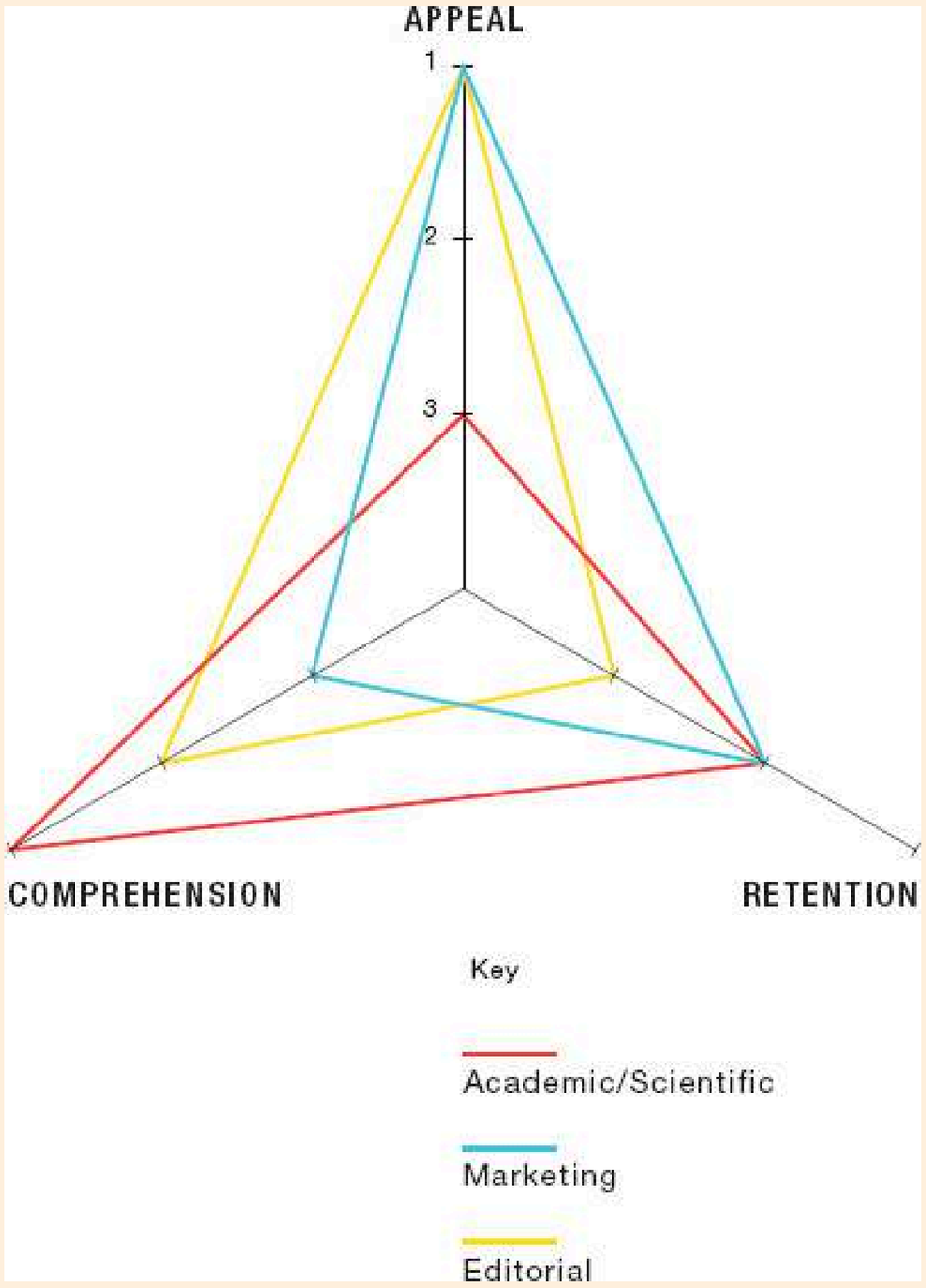
RPM COMPANIES ACHIEVE 102% OF THEIR REVENUE TARGET!

REVENUE PERFORMANCE MATURITY: HOW GROWN UP IS YOUR COMPANY?

Most companies land somewhere in the following four levels of revenue performance maturity.

LEAST MATURE >>>>>>>>>>>>>>>>>>>>>>>> MOST MATURE




APPEAL
1
2
3
COMPREHENSION
RETENTION
Key
Academic/Scientific
Marketing
Editorial

#2028

Nicotine FIENDS

Cigarette Smoking Rates Around the World and What Nations Are Doing to Educate the Public

Researchers predict that by 2030, tobacco-related illness will kill more than 8 million people across the world each year. Of course, people smoke in every nation, but the prevalence varies widely around the globe. Here's a look at different nations' smoking rates, as well as a comparison of the measures different countries are taking to curb tobacco consumption and secondhand exposure.

HOW DOES THE U.S. COMPARE?

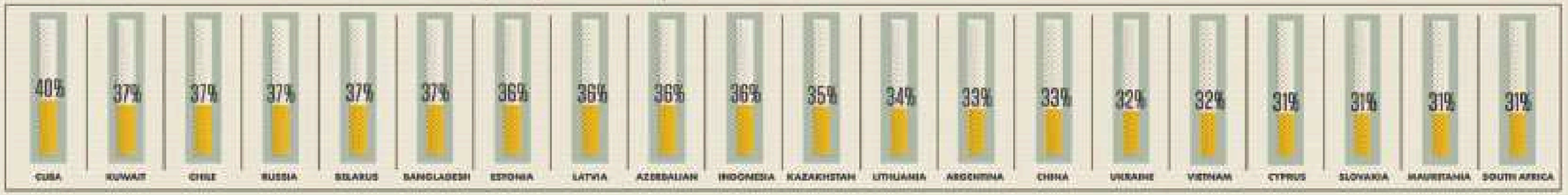
In a 2007 Gallup poll, 24% of Americans reported smoking a cigarette within the past week.

This is comparable to the worldwide median smoking rate of 22%.

INSERT CLOWE

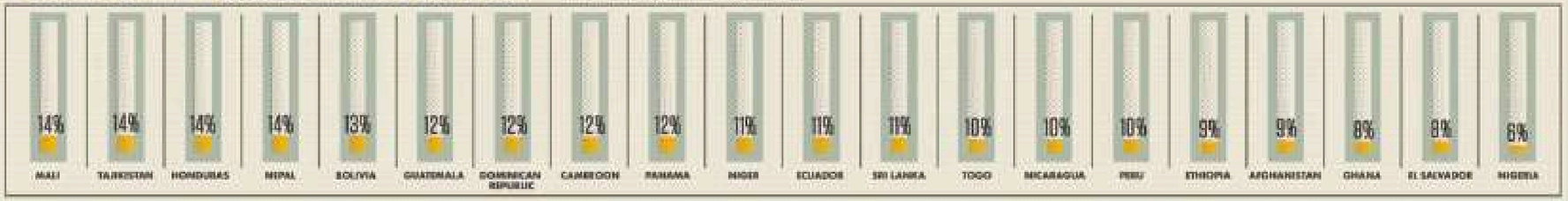
COUNTRIES WITH THE HIGHEST SMOKING RATES (2007)

Percent of country's residents* who smoke



COUNTRIES WITH THE LOWEST SMOKING RATES (2007)

Percent of country's residents* who smoke



* Respondents aged 18 and above.

31 COUNTRIES HAVE ENACTED LAWS REQUIRING SMOKE-FREE **INDOOR SPACES.**

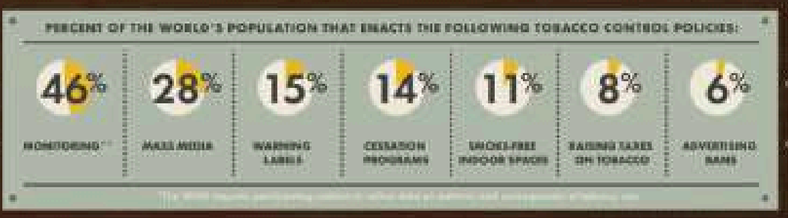
MORE THAN 1.9 BILLION people live in countries that have conducted at least one national anti-tobacco public awareness campaign through mass media.

COIN RETURN

TOBACCO CONTROL POLICIES

In 2005, the World Health Organization created a set of guidelines to manage tobacco use and awareness. Since then, 170 countries and the European Union have committed to follow at least one of the six measures of the comprehensive campaign.

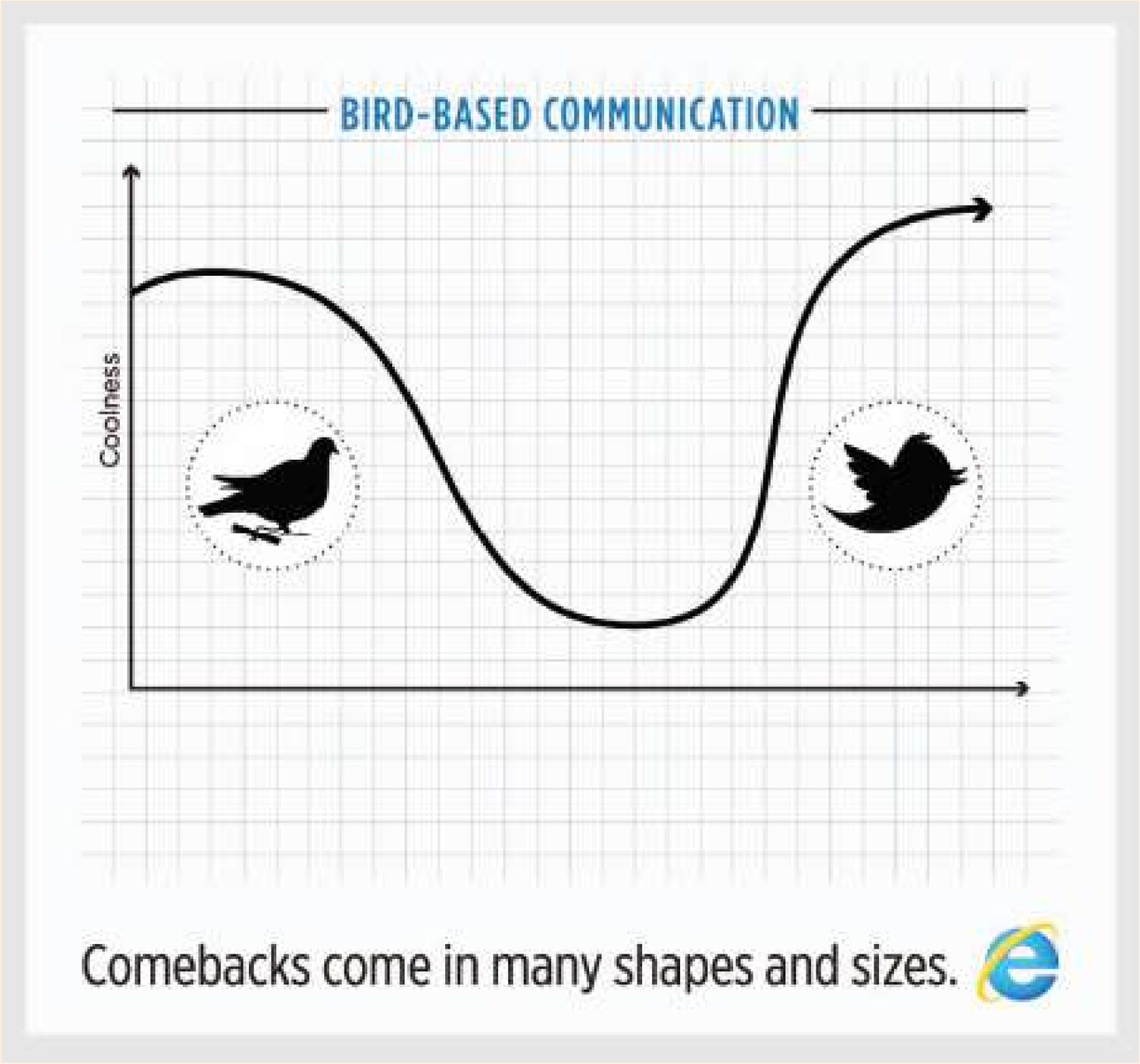
PERCENT OF THE WORLD'S POPULATION THAT ENACTS THE FOLLOWING TOBACCO CONTROL POLICIES:



*The WHO Member parties agreed to collect data on tobacco use and development of tobacco laws.

SOURCES: GALLUP.COM, NYTIMES.COM, WORLD HEALTH ORGANIZATION

A COLLABORATION BETWEEN GOOD AND COLUMN FIVE


BIRD-BASED COMMUNICATION
Coolness
Comebacks come in many shapes and sizes.

DO STUDENTS EAT LIKE PRISONERS?

Hopefully you haven't gotten the chance to taste jailhouse cuisine, but if you're a product of the American school system, you probably have childhood memories of standing in line for grey mashed potatoes, half thawed mystery meat, and slimy canned peaches. How do the trays measure up?

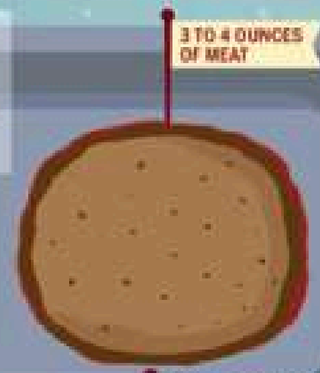
TYPICAL PRISON MEAL[1]

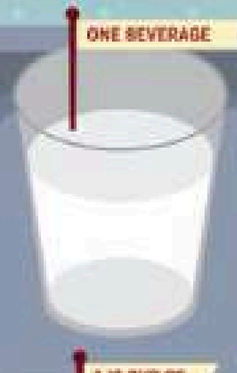
Although prison food is not regulated by the U.S. Food and Drug Administration, most prisons serve a standardized menu that seeks to maintain a moderate level of nutrition.

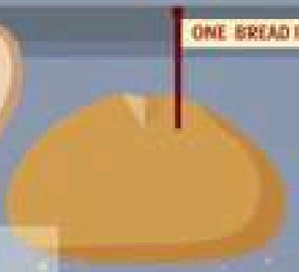
AVERAGE CALORIES SERVED TO INMATES (PER MEAL): 1,300 to 1,450

AVERAGE COST TO FEED A PRISONER (PER DAY): $2.62

2009 FEDERAL BUDGET FOR PRISON FOOD: $205 MILLION





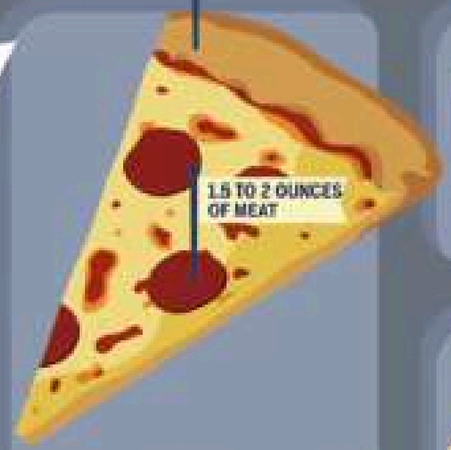


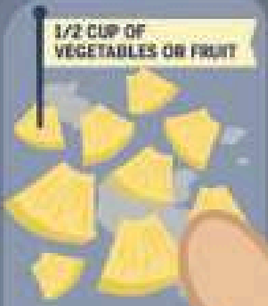
NUTRALOAF BIOPOLITICS

In 2008, inmates at a Vermont prison filed a class-action lawsuit after one too many of their meals featured "nutraloaf," a mixture of whole wheat bread, non-dairy cheese, vegetables, tomato paste, powdered milk, and dry potato flakes. They argued that the food was used as punishment rather than nourishment.

TYPICAL SCHOOL CAFETERIA MEAL[2]

USDA-regulated lunches served at elementary schools are supposed to include all food groups, but many students are served highly processed, unhealthy meals. Under pressure from a growing movement for school lunch reform, in 2010 Congress passed the Healthy Hunger-Free Kids Act, which seeks to make cafeteria fare more balanced and nutritious.





1,400 AVERAGE CALORIES SERVED TO STUDENTS (PER MEAL)

$2.68 AVERAGE COST TO FEED A STUDENT (PER DAY)

$11 BILLION AVERAGE YEARLY FEDERAL BUDGET FOR SCHOOL FOOD PROGRAMS

Percent of school food operations that meet the recommended standard for saturated fat in their meals:

LESS THAN ONE THIRD

WORSE THAN FAST FOOD?

Chains such as McDonald's and Burger King **test their ground beef five to ten times more often** than the USDA tests beef sent to schools.

[1] A fairly typical sample meal, according to the Federal Bureau of Prisons. [2] A fairly typical school lunch meal, according to the Healthy Hunger-Free

Sources: Recommended Content | U.S. Department of Agriculture | U.S. Department of Justice | Economist | The National Schoolhouse Project on Obesity | USA Today | Lowe

A COLLABORATION BETWEEN GOOD AND COLUMN FIVE

Visual Story Map

Stories That Move Mountains

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

https://www.martinjsykes.com/storiesthatmovemountains

Tell the Right Story

Issue with many is lack of clarity on the reason for the story

Spend the time required to work through the Content and Audience rows to get clarity

Tell the Story Right

Issue creation of a visual story without a clear plan for how it's going to be delivered to the audience that needs to support the change.

Story and Tell rows are designed to ensure that the visual story reaches the intended audience, enabling them to act on it.

Visual Story Map

Stories That Move Mountains

C — CONTENT

- Why
- What
- How
- What If

A — AUDIENCE

- Who
- Learning and Decision Styles

S — STORY

- Structure
- Character
- Sense of Urgency
- Delivery Plan

T — TELL

- Design
- Test

https://www.martinjsykes.com/storiesthatmovemountains

Why → What → How → What If

Why?

Andy: Dad, are we stopping the car?

Me: Yes, we need to stop now.

Andy: Dad, are we stopping the car?

Me: Yes, we need to stop now.

Andy: Why?

Me: We are pulling into a gas station.

Andy: Dad, are we stopping the car?

Me: Yes, we need to stop now.

Andy: Why?

Me: We are pulling into a gas station.

Andy: Why?

Me: We need to put some gas in the car.

Andy: Dad, are we stopping the car?

Me: Yes, we need to stop now.

Andy: Why?

Me: We are pulling into a gas station.

Andy: Why?

Me: We need to put some gas in the car.

Andy: Why?

Me: Because the car needs fuel in order for us to get to the arcade.

Andy: Dad, are we stopping the car?

Me: Yes, we need to stop now.

Andy: Why?

Me: We are pulling into a gas station.

Andy: Why?

Me: We need to put some gas in the car.

Andy: Why?

Me: Because the car needs fuel in order for us to get to the arcade.

Andy: Why?

Me: Because I used up all the gas in the tank already.

Andy: Dad, are we stopping the car?

Me: Yes, we need to stop now.

Andy: Why?

Me: We are pulling into a gas station.

Andy: Why?

Me: We need to put some gas in the car.

Andy: Why?

Me: Because the car needs fuel in order for us to get to the arcade.

Andy: Why?

Me: Because I used up all the gas in the tank already.

Andy: Why?

You can follow the Personal Trainer example by flipping to the pages with yellow borders throughout the book.

Example 1: Personal Trainer

My name is Marina. After spending years as a pharmacy technician and medical administrator, I wanted a new lease on life. I looked around to find something I could be passionate about and decided to go back to college for a two-year degree as a certified personal trainer. As I found out though, the problem with passion is that it might not pay too well. I talked with a number of different gyms but found that working for them was really only a last resort. While the gym would collect $50 for an hour of my time, I would earn only about $15 of that, and then still have to cover my travel costs, other business costs, and pay taxes.

So I decided to look into opening my own small training studio, where customers would come just for personal training. I had a good knowledge of how to run a business, and a husband with great business experience who could help. There is a lot of complexity to opening a studio. Setting up accounts, doing marketing and sales, online and offline advertising, and renewing the billings every month was daunting.

Many times, I wondered aloud if there was just some company that would do some of this grunt work for me. Every day I was spending trying to set up a studio was another day when I couldn't focus on the reason I was doing all this — to be a personal fitness trainer.

So with my husband, I started to consider a radical new idea: Why not create a service that allows personal trainers to set up their own training studio as part of a network? Clients could find the service online and sign up for a nearby training studio, learn about their trainer's philosophy, and share their feedback with other clients in an online social forum.

The service would handle the administration of collecting membership and training fees through electronic subscription payments and then pay the trainers directly via their bank accounts. The service would also handle legal fees, hide banking complexity, provide online marketing, and provide simple step-by-step directions for trainers to set themselves up.

To achieve my goals, I need trainers, especially ones who already own a studio, to become interested in joining the network. We created a name and brand identity for the business, "Optimal Balance," and we have started to create some of the services, along with a website, so we can work with our investors. The visual story has to convince studio owners and personal trainers that this is a viable business. It might take a number of presentations to get enough studio owners signed up, but all I need are ten paying customers to be viable. This story needs to be tuned to the very specific needs of these key people, to excite them to make the decision to be a part of something new.

You can follow the City University Hospital example by flipping to the pages with blue borders throughout the book.

Example 2: City University Hospital

City University Hospital is one of the top five hospitals in the country. It's a leading research center and training hospital that serves as the major area hospital with more than half a million patients each year. This is a great place to work, where I can be very proud of what we do. My name is Tom. I lead the IT group that provides systems to run everything from patient information to room scheduling.

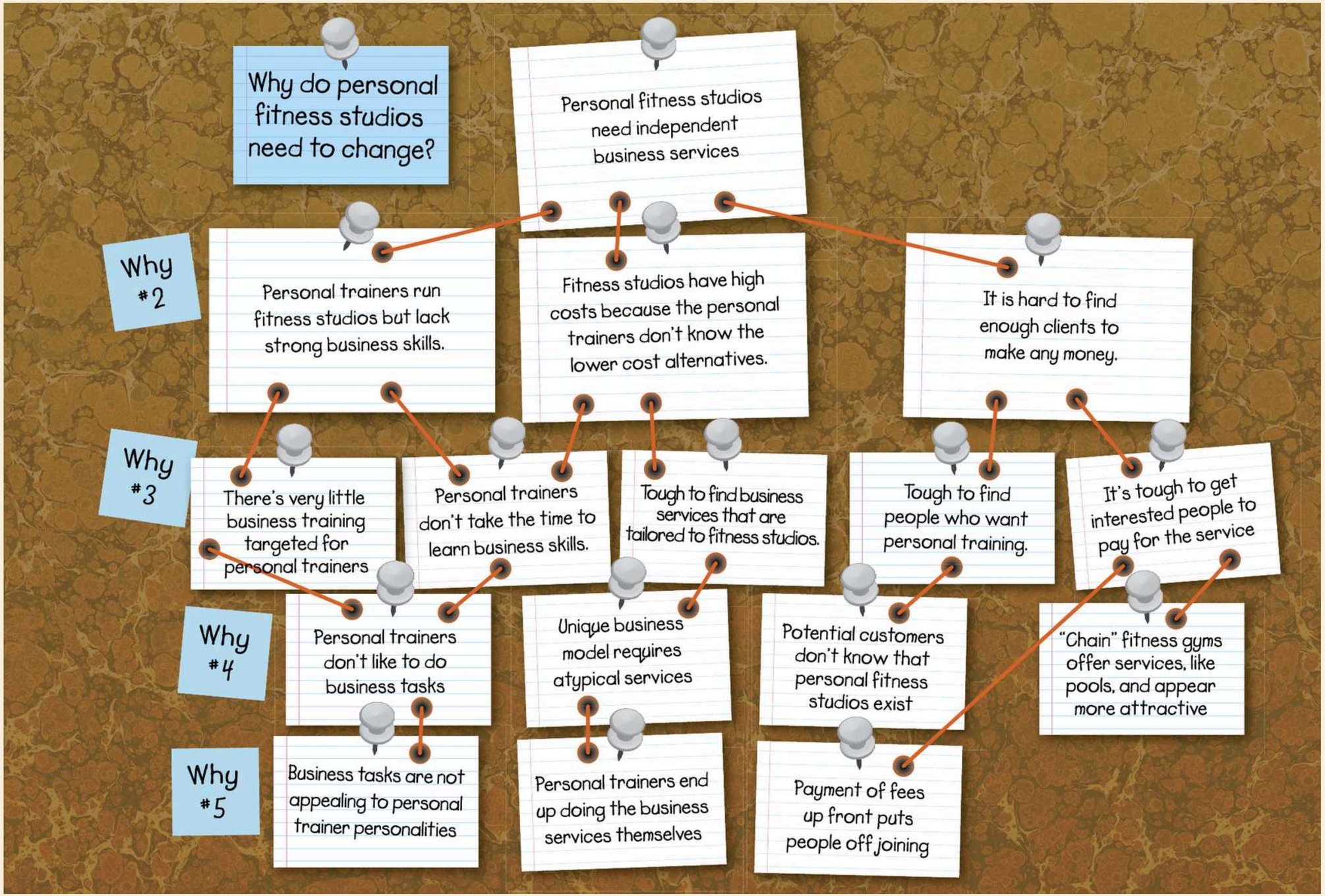
The hospital trustees recently approved a three-year expansion and transformation plan. This will include a new critical care building at the side of the existing Accident and Emergency unit. Capable of handling 70,000 patient visits per year, this facility will lead the way in adopting new technology and processes to improve patient care.

Unfortunately the IT systems have not had the coordination or investment over the past five years to support this plan. I joined the hospital team when the management board decided to bring IT services back under their control, after a long period of being run by an outside company.

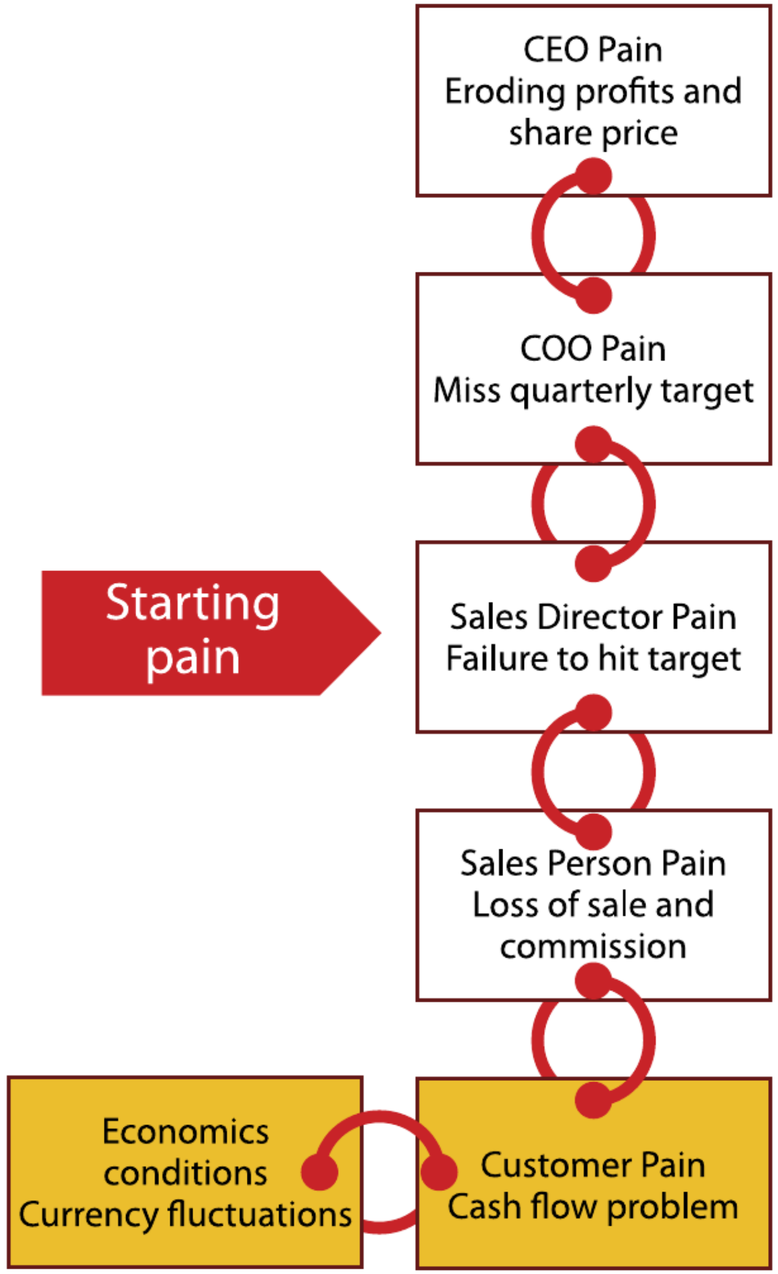
The transformation plan is the first big chance my new team has to make a difference and show how IT really should work. It is great to have this chance, but at the same time, we have to convince a lot of people that we can do this.

Patient data is currently in a mix of systems and on paper. We have islands of information across the hospital and complex processes that have evolved over years to get around the problems this causes. To bring in the IT changes needed to make the new critical-care building a success, we need to get a lot of support from the clinical team, nursing staff and administrators, as well as the financial support from the transformation program's governance board.

Everyone is supportive of the goals for the expansion and transformation plan, but there is a lot of work to do to convince the management and staff of the importance of the IT transformation. They have been working around the existing issues for years and don't realize how much that is compromising their ability to improve in the future. I need a visual story to describe the change we're going to make. This needs to explain the vision we have for the future, how we are going to get there, and how success will depend on widespread participation. I have been through enough big change programs to know this is going to be a team effort across all the departments, and clarity of communication is vital to bring the team together.

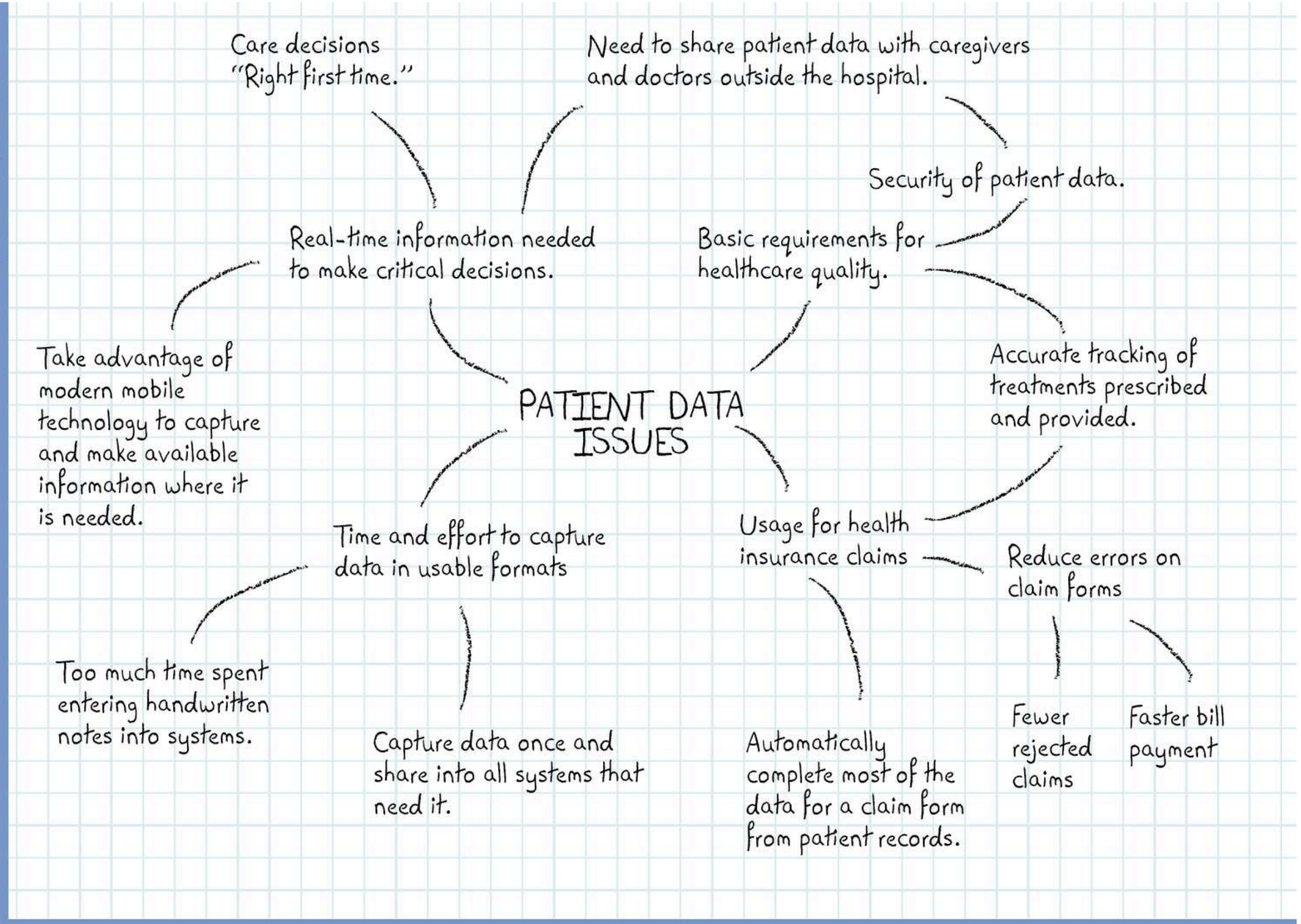

Why do personal fitness studios need to change?
Personal fitness studios need independent business services
Why #2
Personal trainers run fitness studios but lack strong business skills.
Fitness studios have high costs because the personal trainers don't know the lower cost alternatives.
It is hard to find enough clients to make any money.
Why #3
There's very little business training targeted for personal trainers
Personal trainers don't take the time to learn business skills.
Tough to find business services that are tailored to fitness studios.
Tough to find people who want personal training.
It's tough to get interested people to pay for the service
Why #4
Personal trainers don't like to do business tasks
Unique business model requires atypical services
Potential customers don't know that personal fitness studios exist
"Chain" fitness gyms offer services, like pools, and appear more attractive
Why #5
Business tasks are not appealing to personal trainer personalities
Personal trainers end up doing the business services themselves
Payment of fees up front puts people off joining

Pain Chain


CEO Pain
Eroding profits and share price
COO Pain
Miss quarterly target
Starting pain
Sales Director Pain
Failure to hit target
Sales Person Pain
Loss of sale and commission
Economics conditions
Currency fluctuations
Customer Pain
Cash flow problem

#2233

City University Hospital



The City University Hospital example is used in all the chapters on the CAST process to show how Tom develops his visual story. Most of these pages are taken directly from his notebook to show the work in progress. This page started as a white-board from a staff meeting with the COO's leadership team to brainstorm the key patient data issues.

Pain Chain

Claus- CEO
The three-year transformation plan is dependent on tight cost control. Errors in insurance claims cause financial losses equivalent to the total savings we must make in the next three years.

Bernd - COO
IT systems cost money to fix, but the errors from data issues cause financial problems for the hospital and damage its reputation.

Allan – Financial Controller
Difficult to assemble claim forms for health insurance companies from the data in our systems. Many claims are queried or rejected.

Luc – Patient Data Controller
Patient care targets are being missed because of data quality issues. But efforts to improve data quality have met with complaints about the time and effort required.

Nurses
Re-entry of patient data in multiple systems leads to errors which the nurses are held responsible for.

Nurses
Too many different places to record data makes it hard to find information in an emergency.

Insights

1. The pain chain works well when you know the people in the chain.
2. The same problem is felt very differently at different levels in the chain.
3. A lot of people feel the pain, but we need the nurses to make the biggest change.

#2233

CHECKLIST

- ☑ Cover the full range of reasons "Why," and include any "Why nots" as well.
- ☑ Check that the reasons for change define the full scope of the pain.
- ☑ Define the problem in a way that members of the audience can realistically believe they can address.
- ☑ List reasons for change that address the "What's in it for me?" for the different people in the audience.
- ☑ Include a one-sentence objective for the core of the story.
- ☑ Soften or remove your own self-interests from the list to ensure it reflects the audience's interests.

What?

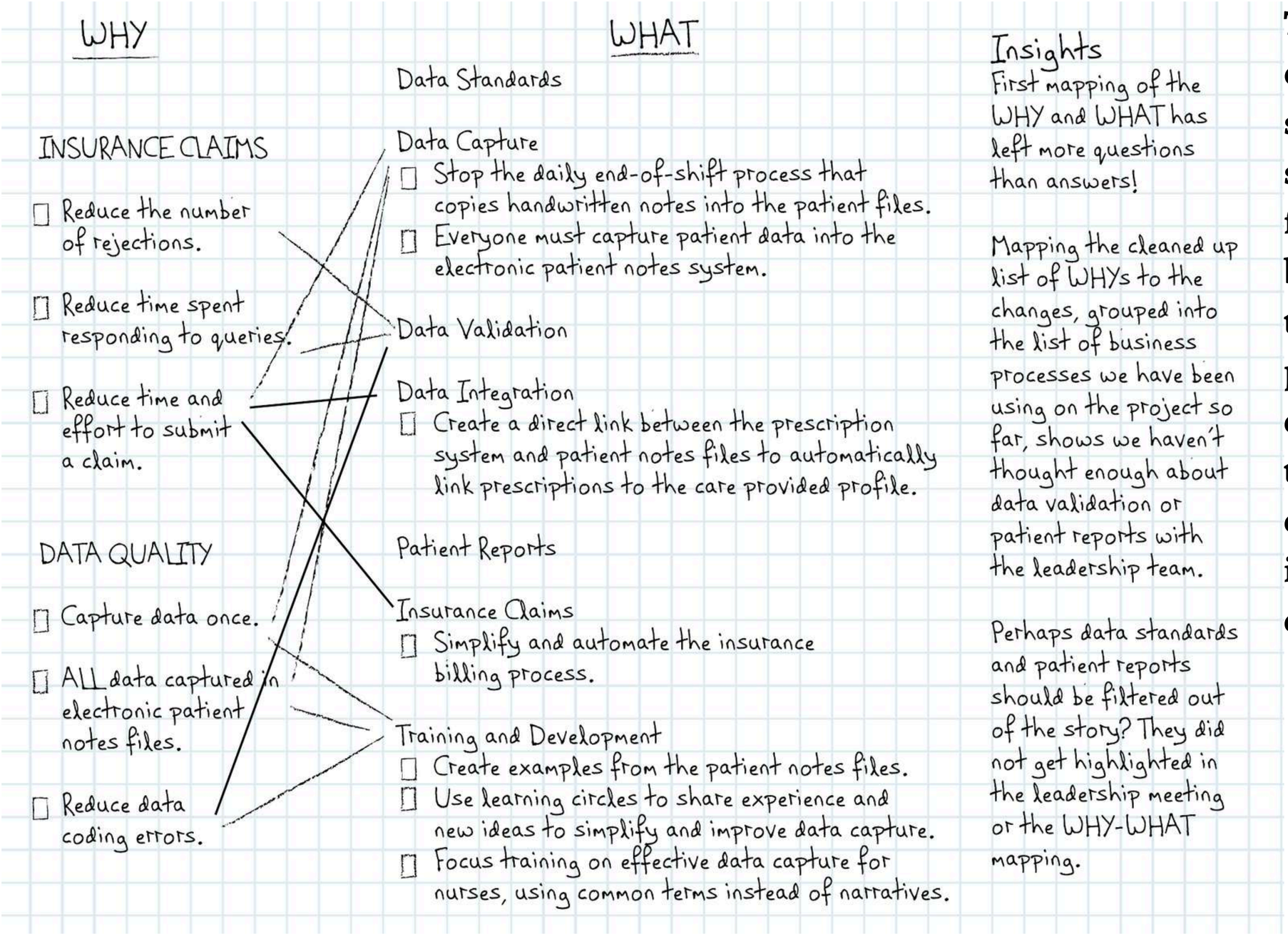
#2233

	Start	Do Differently	Stop	Do Not Change
Things	Get some paper, make up this grid, and start to capture what you already have. If you get stuck, look on the next page for some brainstorming ideas.			
People			It is tempting to jump quickly to the list of actions, but actions act on something. Focus on identifying the elements that will be affected. This will help you identify the objects and characters later in the story.	
Processes		Later in this chapter you will see this matrix used for the Personal Trainer and City University Hospital worked examples.		

Personal Trainer

	Start	Do Differently	Stop	Do Not Change
Things	Studios get new software for checking membership status Customers use Optimal Balance website (branded) for their billing questions	Optimal Balance website must change to allow multiple studios to sign up Optimal Balance to create studio-specific reports and mailing labels Membership card scanners offered to studios to speed sign-in Studio customers must get new membership cards in mail or in person	Studios must switch away from existing customer billing and management services New studios can reduce the cost of creating a website with Optimal Balance templates	Studios can continue to offer their existing services without change No changes are required in equipment or facilities
People	Optimal Balance to create sales procedures for studio sales staff Studio staff must learn new software and tools Build awareness among existing training studio owners Owners use Optimal Balance specialists to fill out information about their studios	Studio sales processes to include Optimal Balance agreements & forms Customers will get new billing relationships. May need new billing data Studio marketing to include getting leads from the Optimal Balance website Customers may have to "come in" to have their memberships changed, sign agreements	It is OK that this column is empty. It means that this particular change does not require us to stop doing many things.	Studios can hire and train their trainers in any way they'd like, without interference
Processes/Activities	Partnerships with other business service providers to get studio leads Optimal Balance needs partnerships to provide membership card scanners and card printers Build awareness among trainers who want to open a studio Studios need to have Internet access. Create partnerships with providers	Optimal Balance will help studios to change their websites to point to the new services Customers get new contact information for dealing with billing issues Optimal Balance to offer training classes for studio owners and staff		Studios never forced to sell any products that they don't want to Studios can present unique offerings, philosophies, and products without interference

	Start	Do Differently	Stop	Do Not Change
Things	Review patient notes files to create examples for training.	Create a direct link between the prescription system and patient notes files to automatically link prescriptions to the care provided profile.		
People	Learning circles to share experience and new ideas to simplify and improve data capture.	Training on hospital systems to focus on effective data capture for nurses, using common terms instead of narratives.	Stop doctors and specialists writing their own patient notes, or handwriting on patient notes printouts.	Responsibility for the correctness of information remains with the person recording the information.
Processes		Simplify and automate the insurance billing process.	Stop the daily end-of-shift process that copies handwritten notes into the patient files. This should be made redundant.	Pharmacists will continue to cross check between patient notes and the prescribing system when dispensing prescriptions, to ensure patient safety.

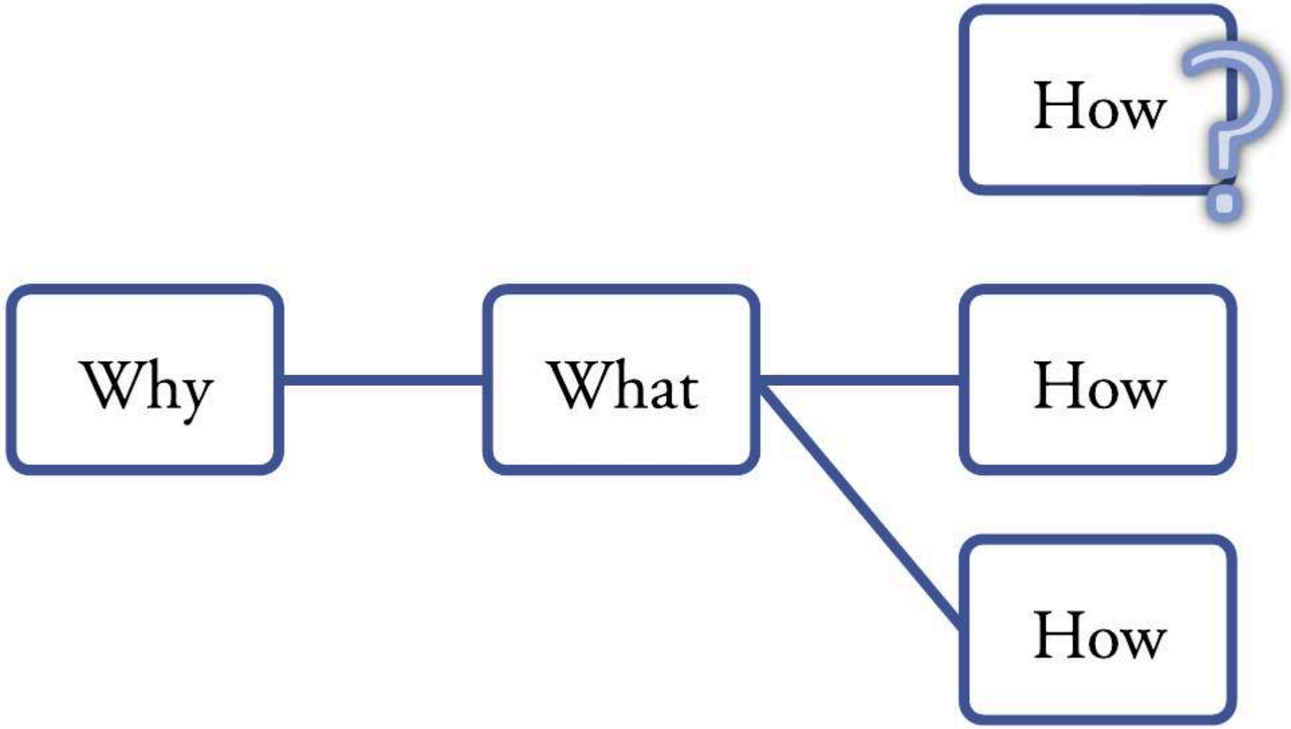


Tom's IT team has been working on the patient data problem for some time and has been using a set of business process names for all the major activities. To bring his notes together with these, Tom uses the business process names to group the changes. He also takes a little time divide the reasons for the change into two groups around insurance claims and data quality.

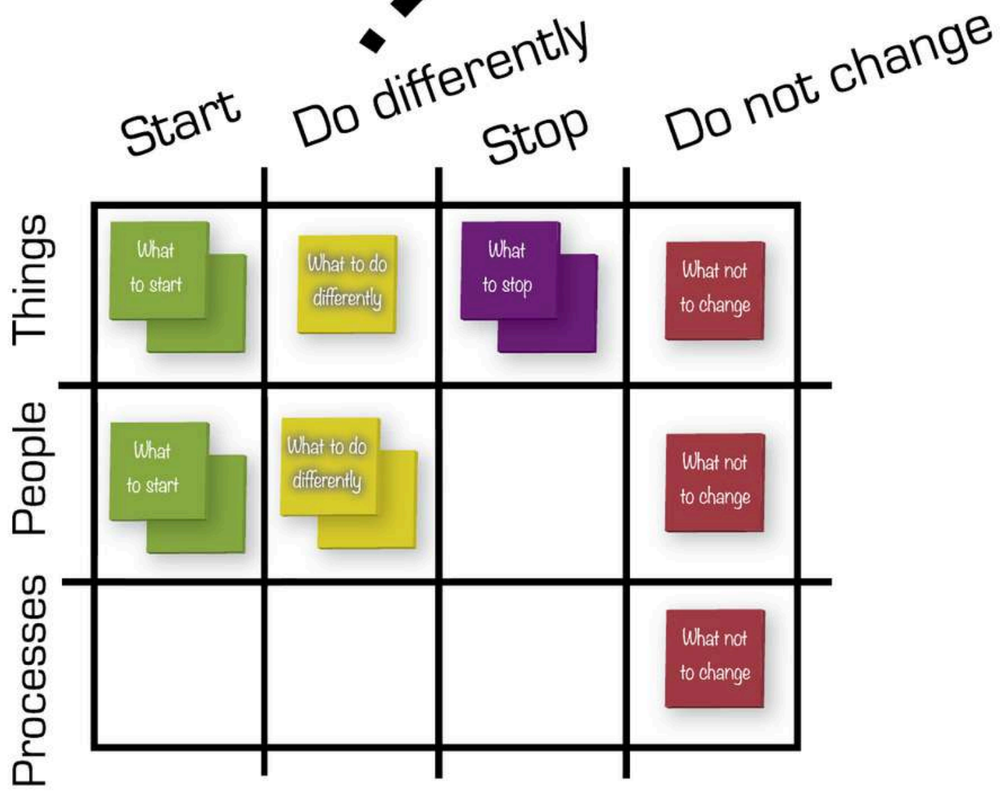
CHECKLIST

- ☑ Map your existing content to the Elements of Change matrix.
- ☑ Use the Brainstorming Categories to iterate through the "Whats" to group, expand, and refine them.
- ☑ Filter and focus to link the "What" and "Why" together.
- ☑ If there's a "What" or "Why" with no relationship, something must be added or removed!
- ☑ Is your ego tied to the story? Probably! That's okay; it will add to the passion when you deliver the story. Just make sure the content is focused on the audience's problem.

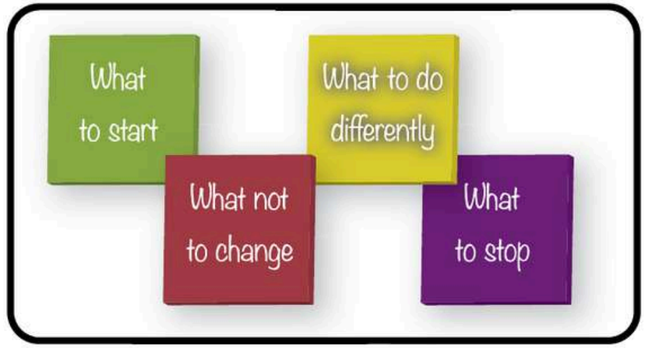
How?


How
Why
What
How
How

Look for people, processes, and things that must change together

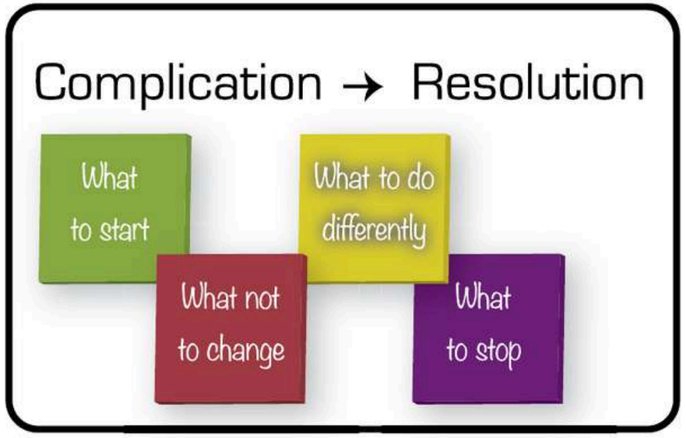


CLUSTER



Work out the sequence for what needs to change in this cluster. Then describe how the change will happen with a focus on the specific issue that starts this cluster (the complication) and the way it ends (the resolution)

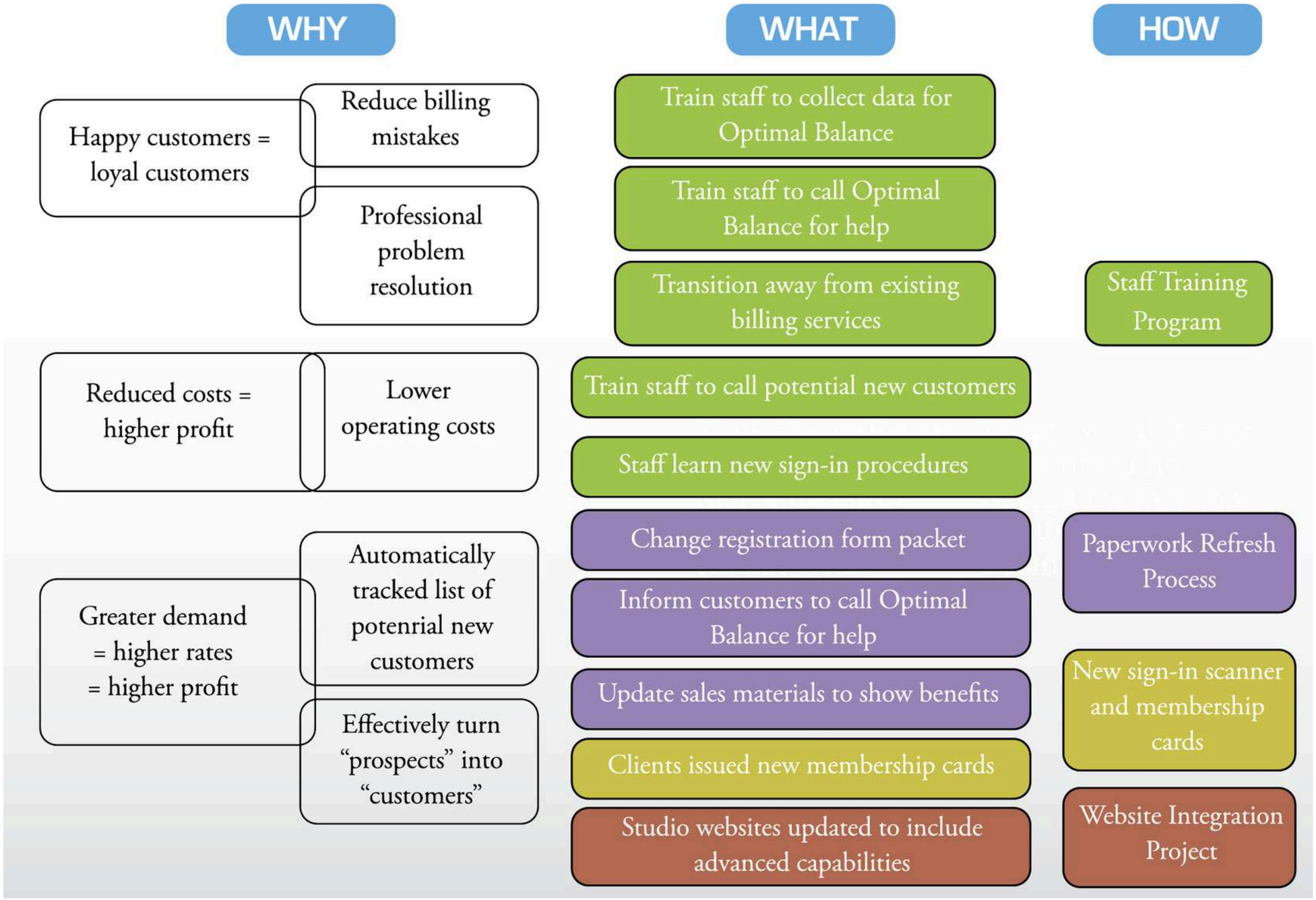
HOW



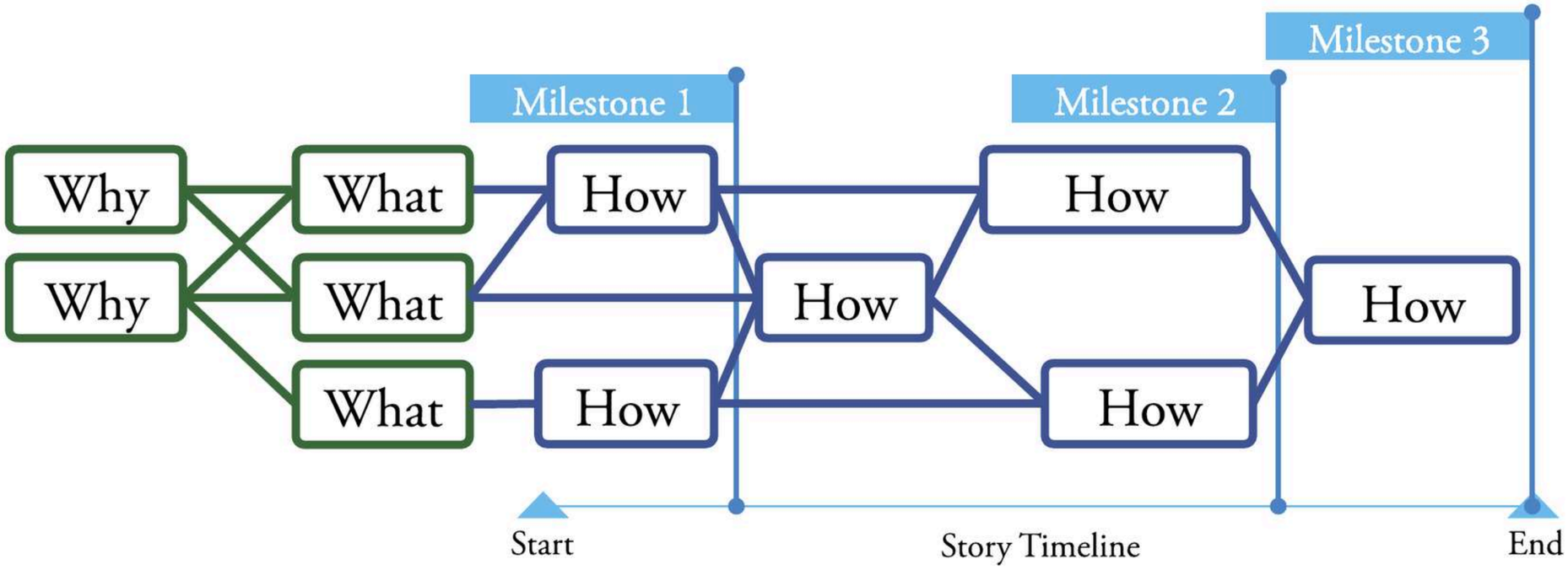
Repeat the process until you have clustered everything

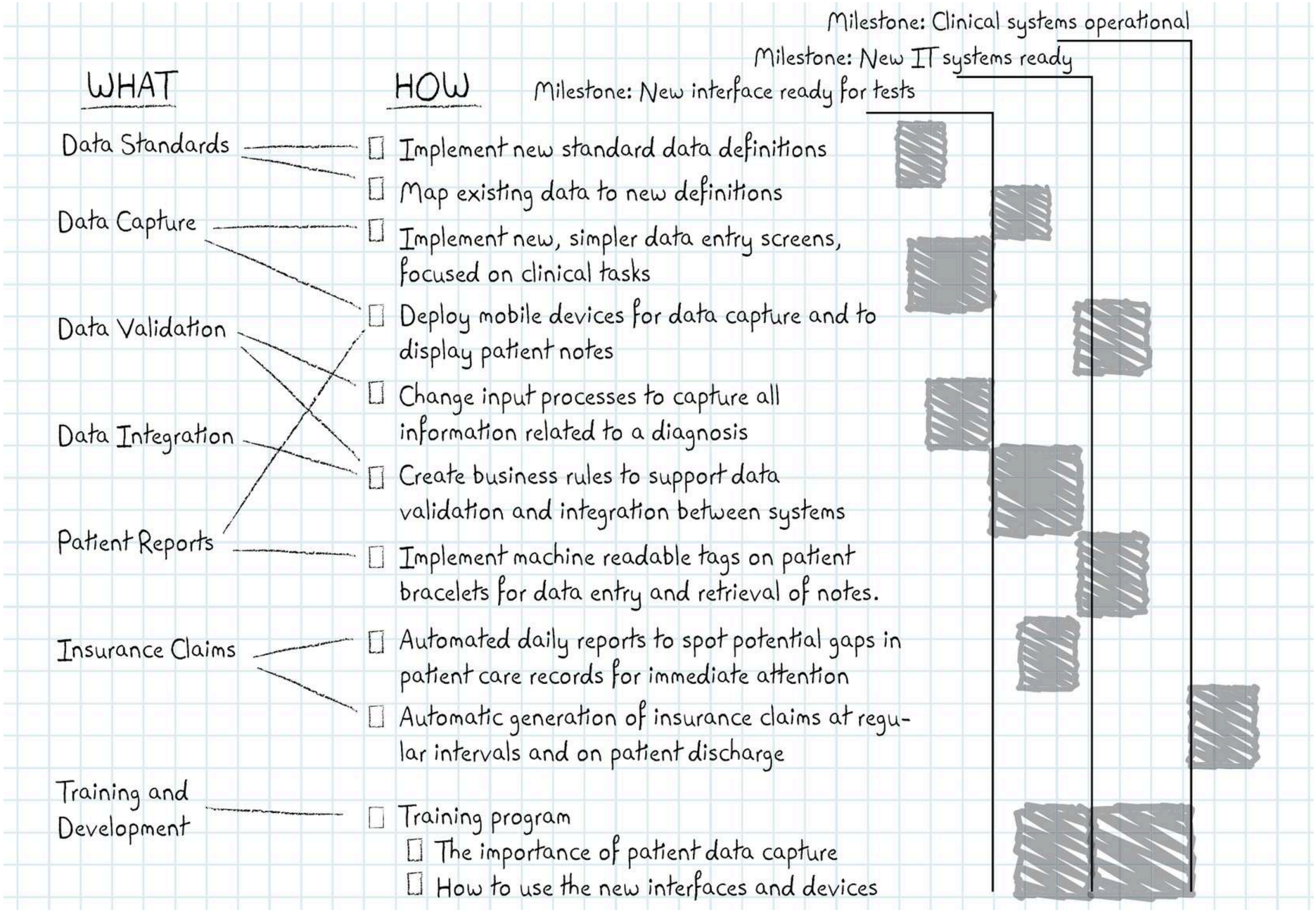
To test your content, try constructing a sentence like this:

We are going to do HOW
to change WHAT
because WHY.


WHY
WHAT
HOW
Happy customers = loyal customers
Reduce billing mistakes
Professional problem resolution
Train staff to collect data for Optimal Balance
Train staff to call Optimal Balance for help
Transition away from existing billing services
Staff Training Program
Reduced costs = higher profit
Lower operating costs
Train staff to call potential new customers
Staff learn new sign-in procedures
Greater demand = higher rates = higher profit
Automatically tracked list of potenrial new customers
Effectively turn "prospects" into "customers"
Change registration form packet
Inform customers to call Optimal Balance for help
Update sales materials to show benefits
Clients issued new membership cards
Studio websites updated to include advanced capabilities
Paperwork Refresh Process
New sign-in scanner and membership cards
Website Integration Project

Effectively break it into milestone




Milestone: Clinical systems operational
Milestone: New IT systems ready
Milestone: New interface ready for tests
WHAT
HOW
Data Standards
Data Capture
Data Validation
Data Integration
Patient Reports
Insurance Claims
Training and Development
Implement new standard data definitions
Map existing data to new definitions
Implement new, simpler data entry screens, focused on clinical tasks
Deploy mobile devices for data capture and to display patient notes
Change input processes to capture all information related to a diagnosis
Create business rules to support data validation and integration between systems
Implement machine readable tags on patient bracelets for data entry and retrieval of notes.
Automated daily reports to spot potential gaps in patient care records for immediate attention
Automatic generation of insurance claims at regular intervals and on patient discharge
Training program
The importance of patient data capture
How to use the new interfaces and devices

CHECKLIST

- ☑ First cluster the "Whats," and then for each cluster identify "How" the change will happen, noting the complication, resolution, and any examples.
- ☑ Use your existing plans and to-do lists as the starting point, but ensure that every "How" can be clearly linked to a "What" and through to a "Why."
- ☑ Every "What" must have at least one "How" defined for it.
- ☑ Create a dependency analysis for the "Why," "What," and "How," and then identify the milestones for the visual story.

What if

START ON THE RIGHT SIDE OF THE PAGE AND READ BACK TO THE LEFT!

You are now back to today.

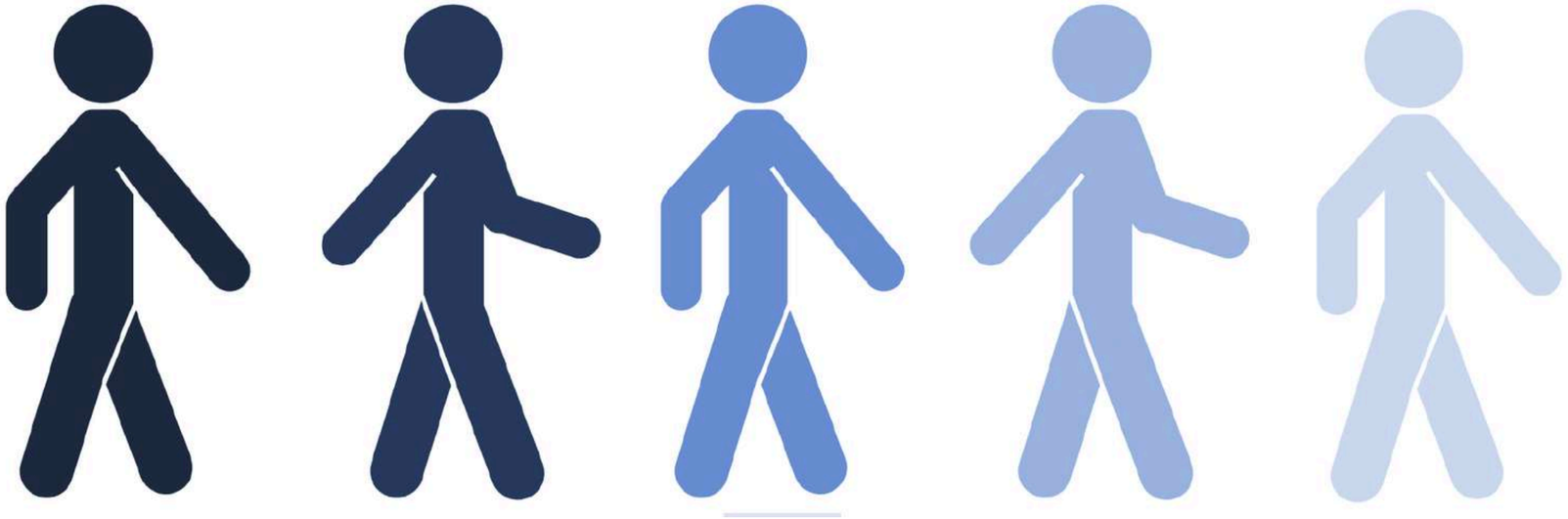
Talk about what it feels like to consider taking on this change. *Open your eyes and review the notes.*

Step back.

Go back to the previous milestone in the "Why-What-How" timeline. Talk about what it feels like to be there, to have completed the last steps, and how you are feeling about the next steps. Think about what you can do at this point in the future that you cannot do today.

Start here.

Stand with plenty of space behind you. Close your eyes. Put yourself in the future, when the change has happened. Talk about what it *feels* like to be here. The change has been made. What can you do after the change that you cannot do today?



City University Hospital

Risks

1. When we change over to the new interfaces for data capture, the nurses and doctors will have to put in extra time for the training, and then it will take longer initially for them to work through the new interfaces. The risk is that they slip back to using paper notes, and the benefits of the new systems to capture data at point of measurement are lost.

2. We cannot get the new mobile devices deployed until after the software is updated. For a while, the nurses will need to keep going back to the fixed PCs to enter data. The risk again is that they use paper notes throughout the day and just enter at the end of day. This would mean that the nurses might not have the information to answer the extra questions the new business rules ask for, and no ability to quickly capture it.

Alternatives

1. Wait for another hospital to implement these changes, and then copy them. This could be a delay of a number of years, during which we would continue to lose revenue.

2. Make no changes until the mobile devices and patient tags are ready. Much more of a big-bang change in processes and work practices; that could cause bigger issues on the first few days.

3. Hire specific people to focus on the insurance claims process, to improve quality and reduce the rejection rate. This fixes the symptom, not the problem, and we would always require these people.

When Tom did the review with Ralf, he also spent time talking about the risks and potential alternative approaches. They covered a lot of ideas, but agreed these were the major ones that the stories would need to consider.

What will the future feel like after the changes?

Emergency situations on the ward can be handled by any nurse, with confidence that they can see the latest information.

Always able to pick up a mobile device, scan a patient tag, and get the latest patient report.

Everyone working on the ward knows how to enter data into the system.

Feels like everyone is pulling together. A strong team around the patient.

You can trust the patient data to be correct and up-to-date.

Insurance-based revenue is compensating for public funding cuts. The feeling that cuts are coming, which we have lived with for years, does not seem as strong.

This feels like a leading edge hospital. A place where we have invested in things that make a difference to patient care.

My concerns over patient care issues from poor data are gone!

Nurses and doctors are sharing more information about the care plans for patients. Nurses are feeling a lot more involved, and doctors are seeing the positive benefits in patients getting the right care.

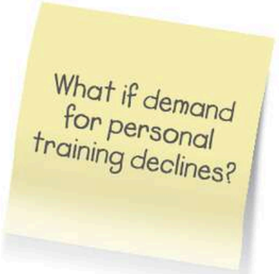
Management teams are happy with the insurance billing levels.

The value proposition of the Optimal Balance system is threefold: reduce the costs to run a small studio; help new studios to start by simplifying the complex financial concerns; and offer the ability for clients to transition from one studio to another.

Until there are many studios in the system, the third value proposition won't matter. While important, the ability to move between studios is not necessary to make the business case compelling.

There are two reasons that a personal trainer would open his or her own studio: more control, and better pay. If commercial gyms improve their pay, trainers may not want to run their own gyms.

Running a studio is easier and more profitable with the Optimal Balance system, so we should focus on the control aspects and highlight the income advantage to the trainer, who will also be the owner, as this scenario is pretty unlikely anyway.



Demographic and economic changes may impact the local market for personal training.

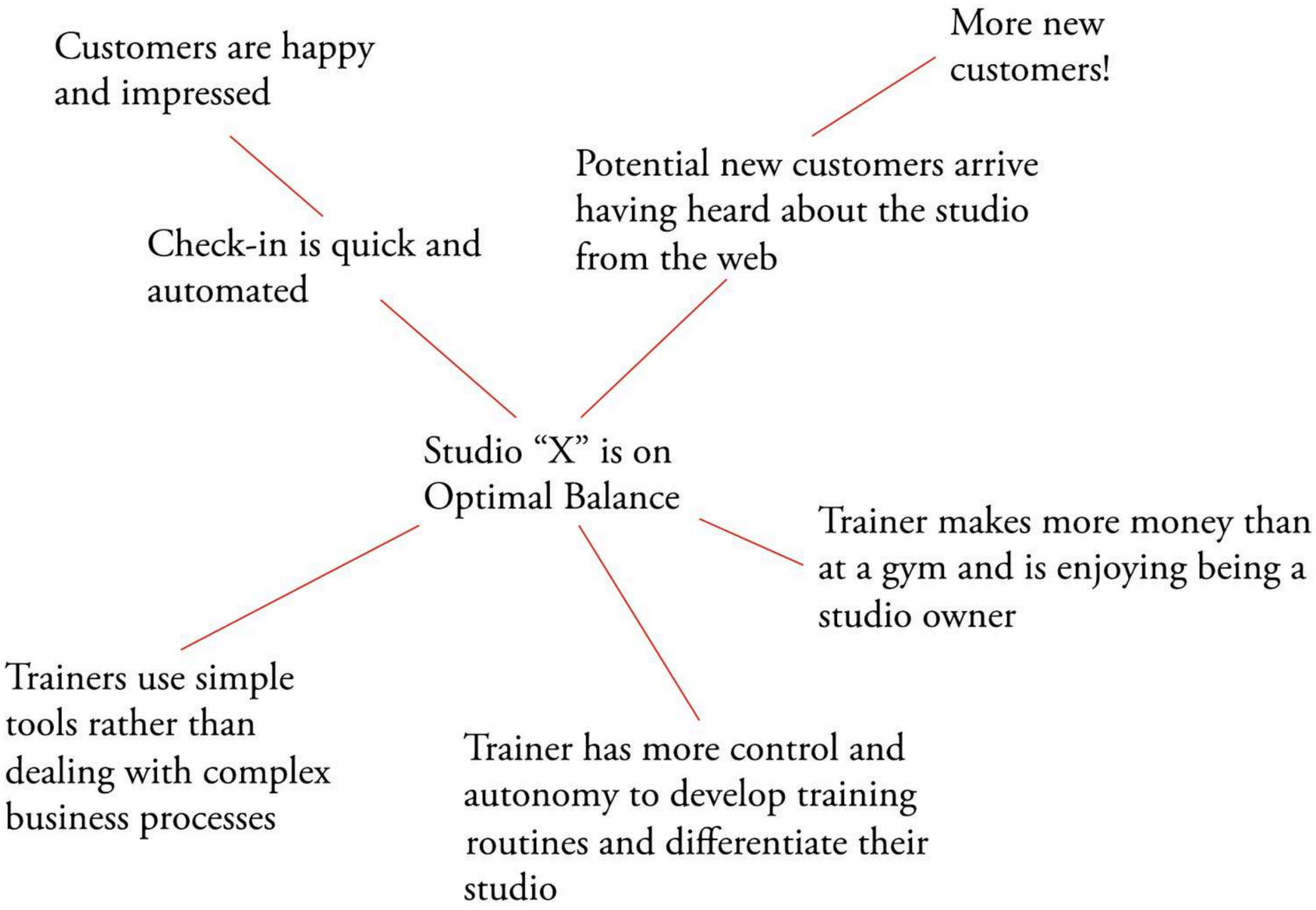
Since the Optimal Balance system reduces cost and hassle, and potentially provides some new customers, it allows studios to cope better with economic hardships than they would on their own.

The Optimal Balance system cannot prevent a studio from going out of business. Optimal Balance will continue to recruit new studios to overcome the turnover in existing partners.

This is a nice problem to have, but still a problem. Most studios have a limited capacity for personal training time.

The nice thing about the Optimal Balance system is that a client can visit a nearby studio while your studio hires staff or buys equipment to increase capacity.

In other words, you don't have to say "No" because you are full. You can say "Yes, but I'll need you to use our partner a few miles away for a week or two."


Customers are happy and impressed
More new customers!
Check-in is quick and automated
Potential new customers arrive having heard about the studio from the web
Studio "X" is on Optimal Balance
Trainer makes more money than at a gym and is enjoying being a studio owner
Trainers use simple tools rather than dealing with complex business processes
Trainer has more control and autonomy to develop training routines and differentiate their studio

CHECKLIST

- ☑ Be very focused in order to strengthen the story and call out the risks before anyone else does.
- ☑ Identify the future consequences, the possibilities the audience can consider that come from acting on the story.
- ☑ Understand the alternative stories (scenarios) the audience might consider and the comparison you need to make to ensure that they choose your story.
- ☑ Annotate the "Why-What-How" timeline with the "What-Ifs."

Visual Story Map

Stories That Move Mountains

C — CONTENT

- Why
- What
- How
- What If

A — AUDIENCE

- Who
- Learning and Decision Styles

S — STORY

- Structure
- Character
- Sense of Urgency
- Delivery Plan

T — TELL

- Design
- Test

https://www.martinjsykes.com/storiesthatmovemountains

Who?

Too often, the designer of a presentation or other communication assumes that the background and goals of the audience are similar to his or her own.

Too often, the designer of a presentation or other communication assumes that the background and goals of the audience are similar to his or her own.

Many presenter also assumes that the audience is made up of nearly identical individuals who will all respond the same way to the presentation

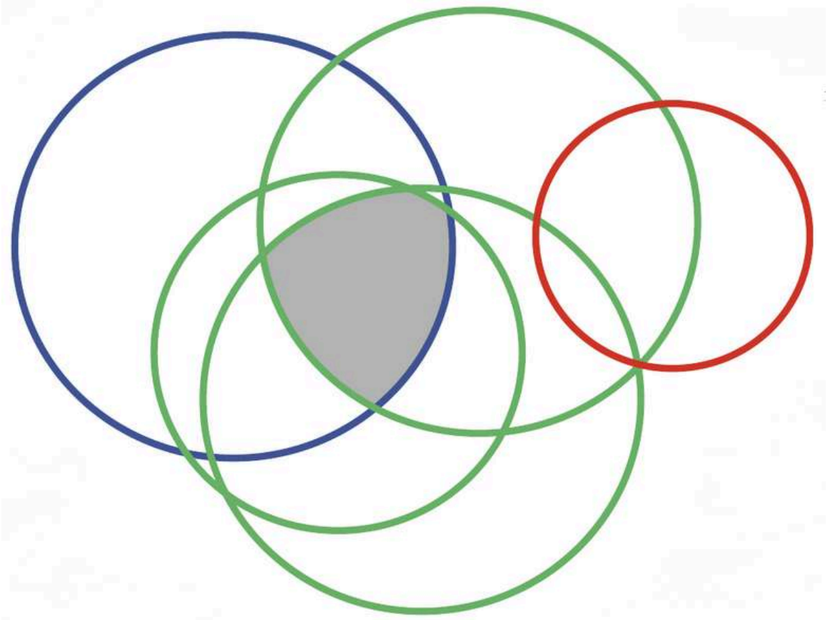
Audience is like this Terracotta Army

Audience is like this Terracotta Army

At first glance they look like row upon row of identical statues, but in reality each of the more than 8000 soldiers is different.

Finding the Common Ground

Every individual in your audience has some existing knowledge or context relevant to your story.



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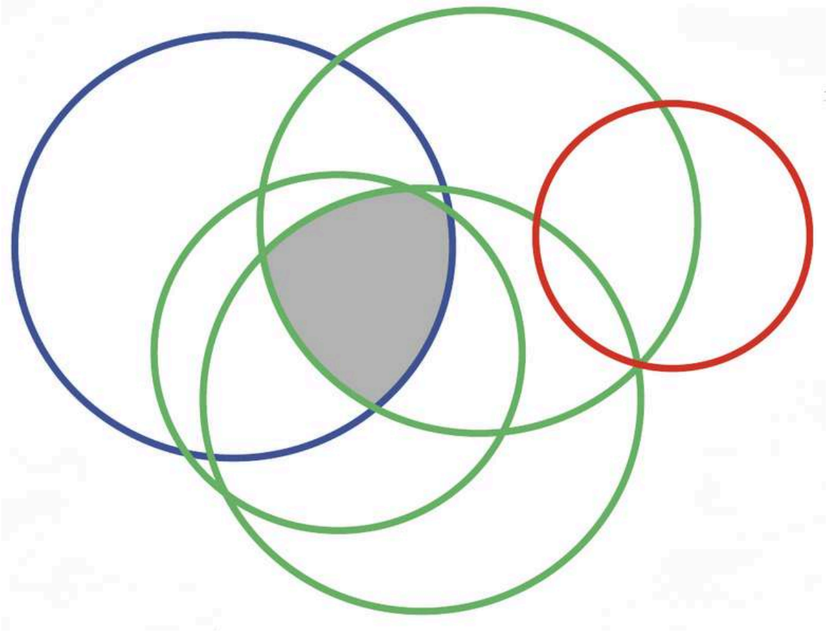
Imagine this context as a map in the mind of each individual.



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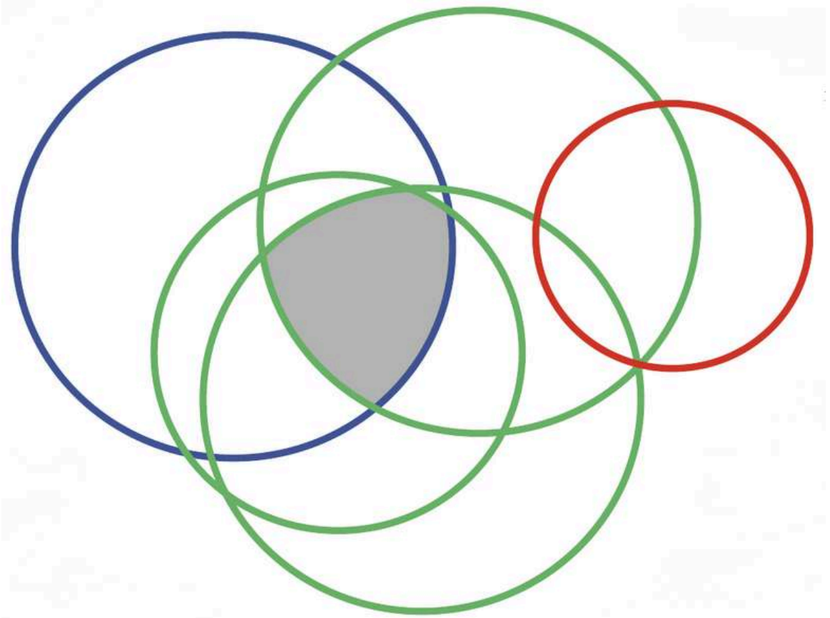
Existing Mental Map + Your Story = New Mental Map



Focusing on the right people in the audience

Creating a Power Map

Power follows the golden rule: The person with the gold makes the rules.

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POSITION OF AUTHORITY In a recognized hierarchy, the person in this position possesses the ability to deploy and use the power of anyone under them.

MONEY Whether through direct budget, donation, or the ability to purchase any other form of power, money is one of the most significant power bases.

TRACK RECORD A demonstrated ability to be successful that makes people consider your requests more favorably.

Sources of Power

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ACCESS The ability to control access to other people or to information is a significant source of power in modern organizations.

COMMON INTERESTS These may be shared goals or a common enemy. The power of a common interest can influence people to share a common decision.

THOUGHT LEADER The person to whom others turn when an idea is required or an innovation must be reviewed.

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SOCIAL INFLUENCE People are more apt to buy from people they like. Social networks and relationships can bring the right people together and influence them.

EXPERTISE Direct and demonstrable experience of the subject matter of the story is a strong influencing power.

USEFULNESS The ability to deliver the outcome proposed in the story is a strong influencer for decision makers.

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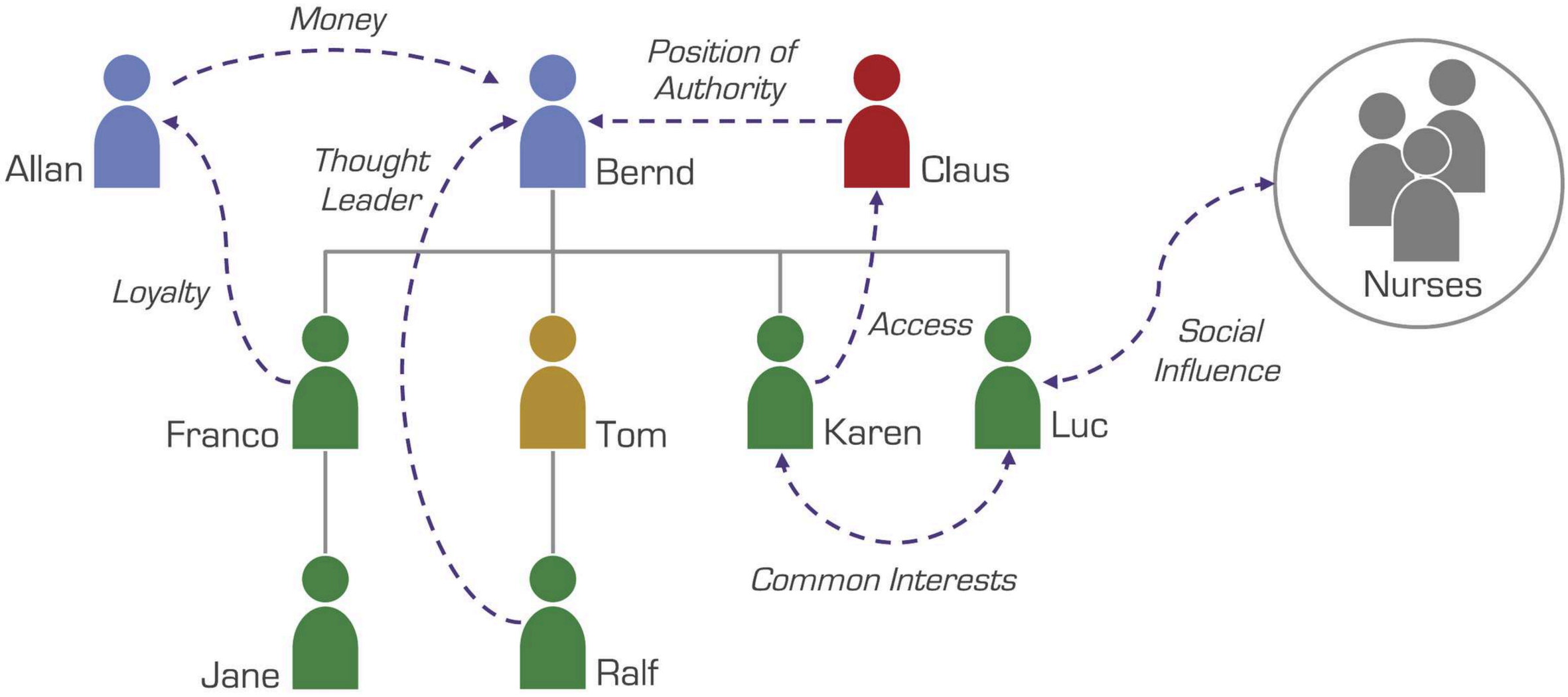
PERSONALITY Charisma, presence, or simply the right personality type can make a huge difference in the ability to influence.


Money
Position of Authority
Allan
Bernd
Claus
Thought Leader
Nurses
Loyalty
Access
Social Influence
Franco
Tom
Karen
Luc
Common Interests
Jane
Ralf

In addition to understanding the power relationships, you need to consider the different roles the audience members will play with respect to the story and the decision.

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KEY DECISION MAKERS

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PRIMARY AUDIENCE

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KEY DECISION MAKERS

PRIMARY AUDIENCE

SECONDARY AUDIENCE

Audience Member	Role & Power	Why	What	How	Attitude	Notes	Desired action
Allan (Financial Controller)	Decision maker Money	Must balance costs with the need for change.			Neutral	Low	Agree to release funds to make the change happen
Bernd (Chief Nurse and Operating Officer)	Decision maker Money; Position of authority	Grow the reputation of the hospital.	Critical Care unit	Implement expansion and transformation plans.	Negative	New in role. Being very careful not to make mistakes as Claus (CEO) is watching closely.	Agree to implement the changes
Luc (Patient Data Controller)	Primary audience Common interest with Karen; Social influence with Nurses	Achieve goals for data quality and error rates.	Patient data	Implement new patient data management systems.	Positive		Support the decision
Ralf (Operations Manager)	Gatekeeper Thought leadership				Neutral	Bernd will not listen to the story unless Ralf recommends	Be a positive supporter and recommend to Bernd.
Nurses	Primary and secondary audience: Social influence	Reduce time spent entering data and improve quality.	Manage patient information.	Change the data entry process.	Positive		Influence Luc to support the decision.

Audience Member	Description	Motivational Hook	Importance
Studio owners who are trainers	These trainers have built a business and may or may not need help	Want to reduce the complexity of managing the financials and customer service	The most common target customer
Studio owners who are not trainers	These business people have hired trainers to work in their studios	Want to reduce costs and offer additional benefits to attract new customers	Fairly uncommon
Trainers wanting to own a studio	These trainers are either students, or are working in a gym and desire to break out	Simple and quick way to get from "dream" to "reality" of running your own training studio	Common, but often don't have the resources to get started. Need to find the good candidates and spend time to "develop them" into an Optimal Balance customer
Advisors to existing studio owners	These business people and friends influence the decisions of studio owners	They want their friends to do well, and may need to see that Optimal Balance has worked for others	Not normally a target group, but worth considering
Trainers at large gyms	These trainers may view a local studio as "the competition"	Emphasize message that trainers who join Optimal Balance were once "like them" to reduce resistance	Possibly unfriendly audience; may say negative things about smaller studios. Potential future customer.

CHECKLIST

- ☑ For each of the "Why," "What," "How," and "What If" elements, identify all the people who should be considered for the audience and for a role in the story.
- ☑ Name the decision-making individuals or groups involved in the change who have the power to say Yes, and the source of their power.
- ☑ Understand the background for each audience segment and key individuals to align the context of their experience with the basis for the visual story.
- ☑ Create a power map for the audience members with their current attitude toward the change you're proposing.

Learning Styles

There are many diffrent learning styles:

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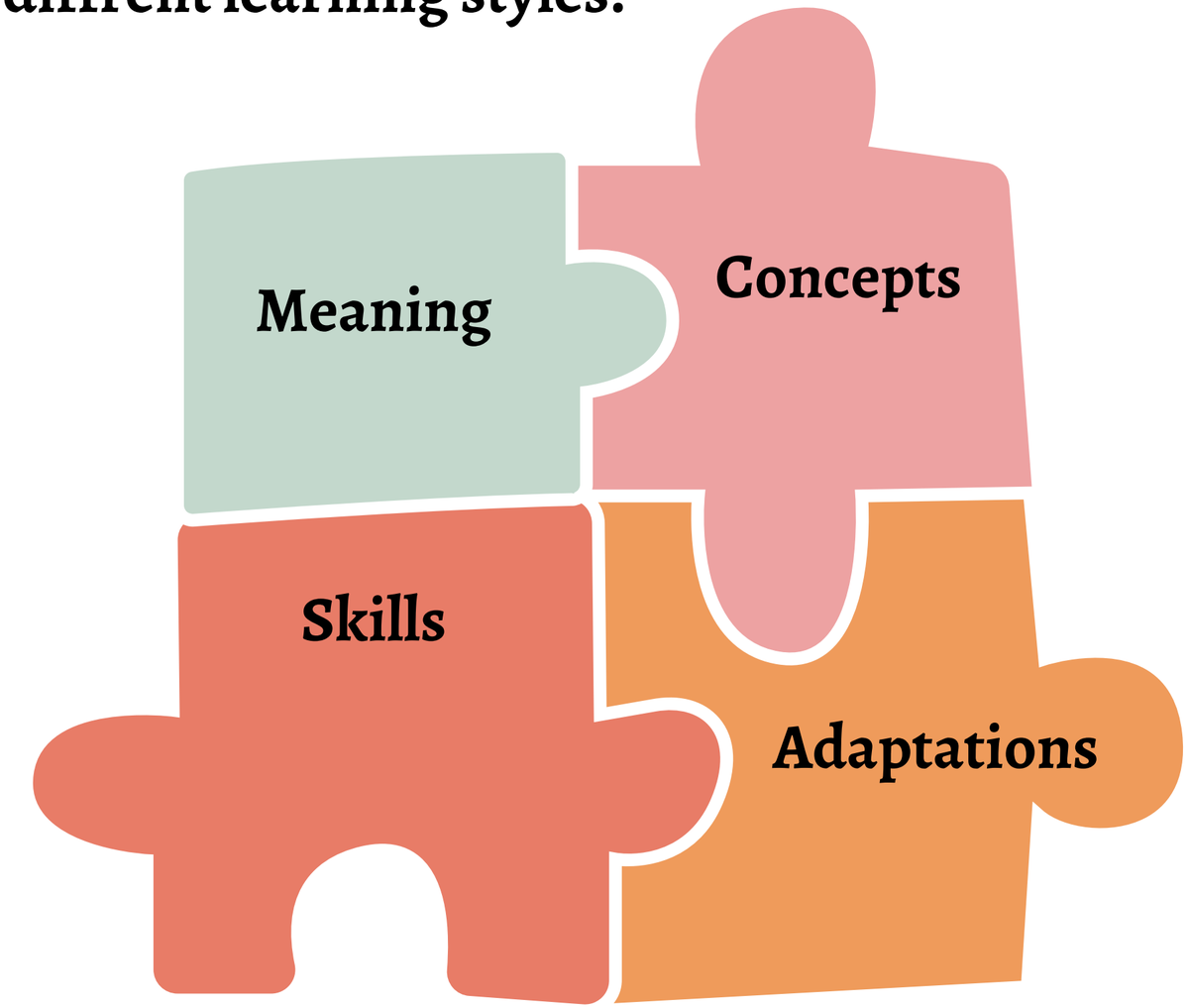

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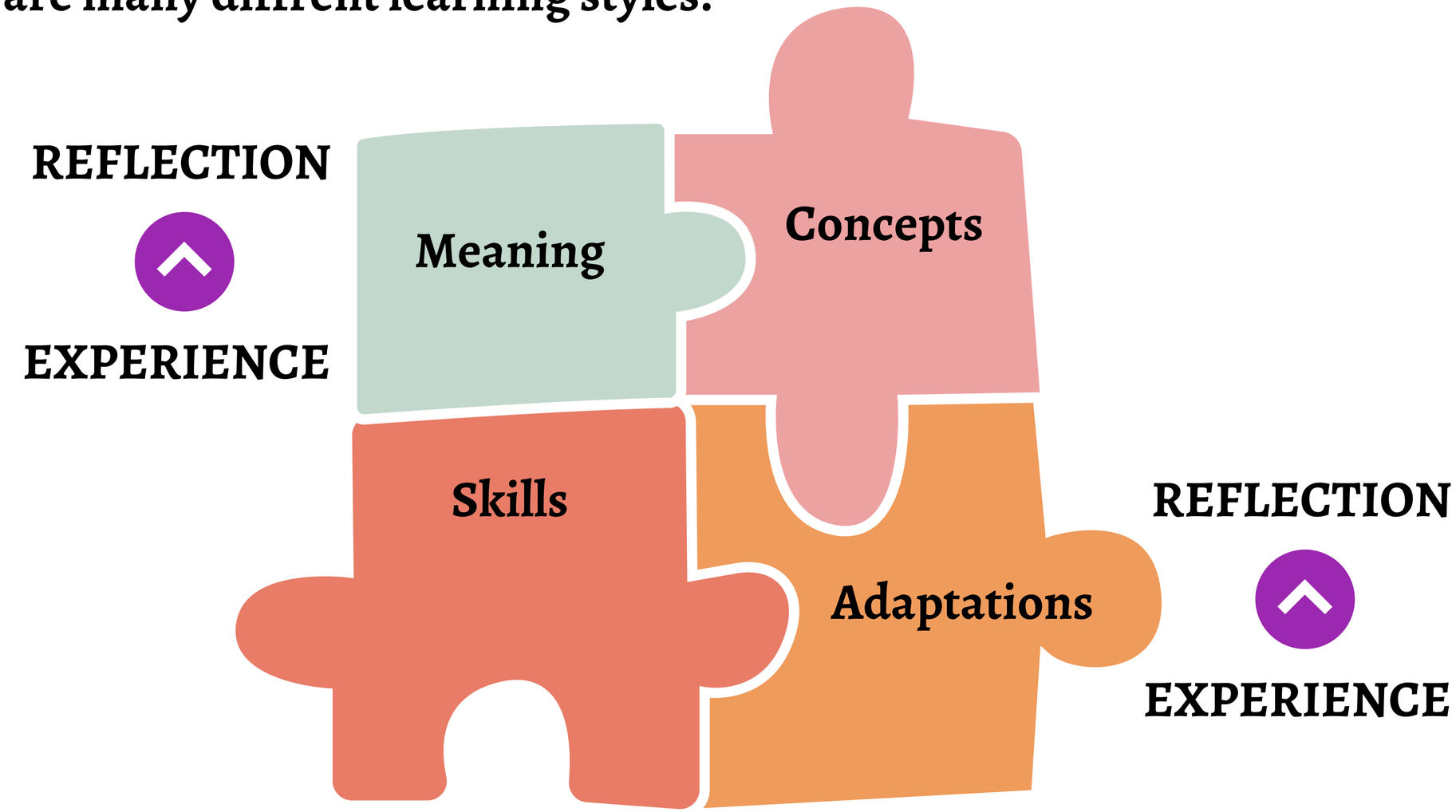

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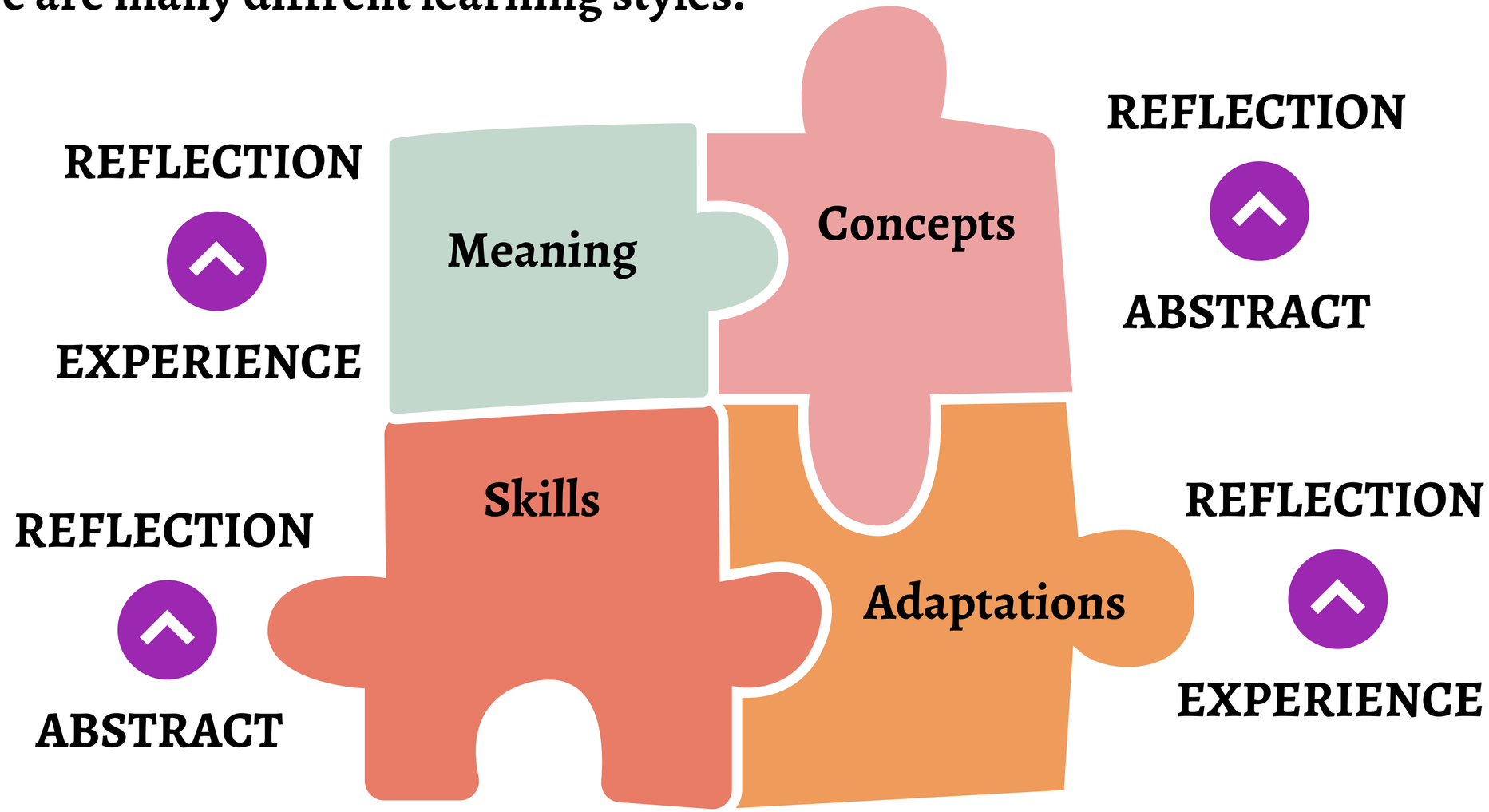

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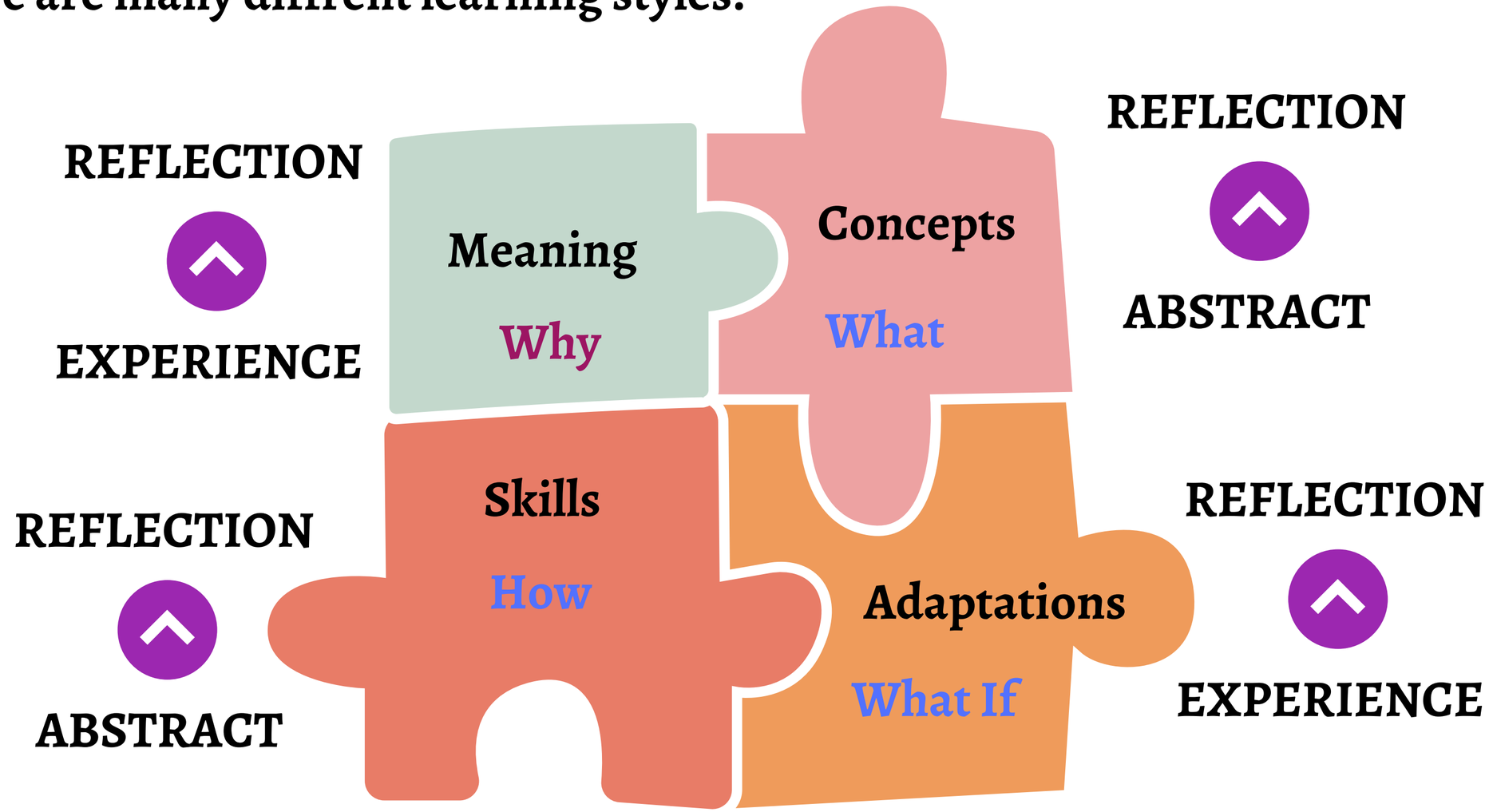
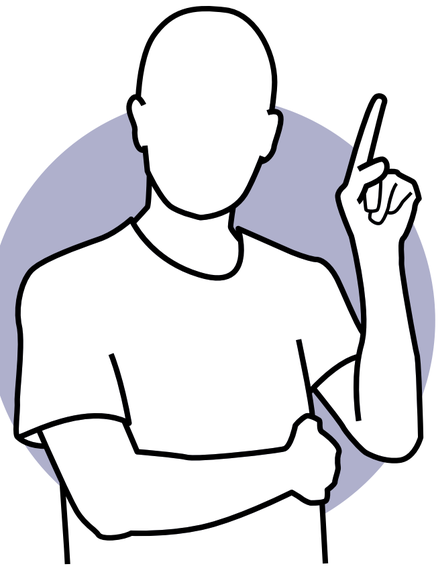




Meaning

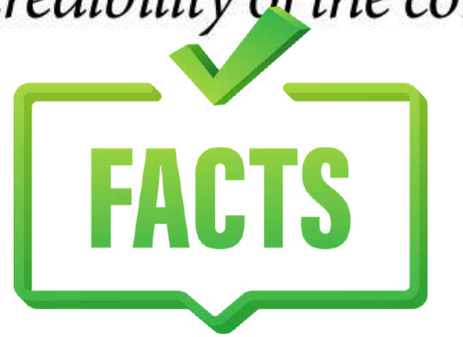
Meaning-type learners have a strong desire to make connections and understand the reasons *why*. If they don't understand why something is important they will lose interest.

APPROACH: *Make sure that the motives for the characters and the message of the story are clearly stated early in the story to ensure your audience keeps listening to the conclusion.*

Concepts

Concepts learners have a preference for analytical learning, working from the overview down to the detail. They seek out the facts and research additional materials and expert opinion.

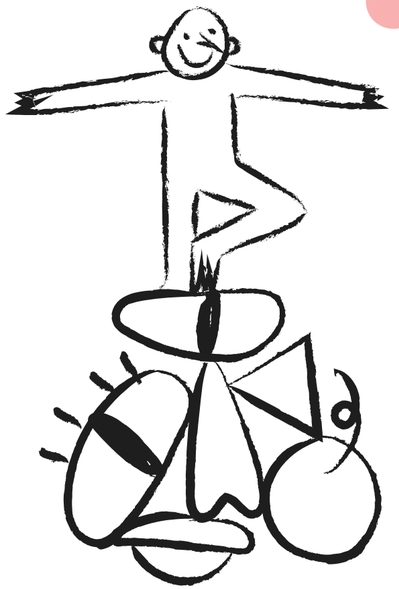
APPROACH: *Build key facts into the story, and have the ability to drill down further as required to support the credibility of the content.*



Skills

Skills-type learners want to know *how* the change will be accomplished. They are practical and are focused on building, creating, and understanding what it will take to make the change happen.

APPROACH: *Don't just list the changes to be made; explain the steps to go through, the specific skills and behaviors needed to be successful.*



Adaptations

Adaptations learners might consider themselves pathfinders or innovators. They're interested in the new opportunities and potential problems and will often be the first to adopt the change, learning by trial and error.

APPROACH: *Be clear on the challenges, the opportunities that can be created, and the unknowns that need to be explored and resolved.*

Decision Styles

Directive

LOW AMBIGUITY TOLERANCE

Decision Styles

Directive

LOW AMBIGUITY TOLERANCE

Conceptual

HIGH AMBIGUITY TOLERANCE

Decision Styles

Directive

LOW AMBIGUITY TOLERANCE

Analytical

HIGH AMBIGUITY TOLERANCE

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HIGH AMBIGUITY TOLERANCE

Behavioral

LOW AMBIGUITY TOLERANCE

Directive

Directive-style decision makers are often focused on financial results and are objective-oriented. They trust facts and structured information with an impersonal approach.

APPROACH: *Deliver the important points as quickly as possible, and give supporting details only when requested. Explain how the change will happen, the key milestones, and when it will be possible to see the results.*

Conceptual

Conceptual-style decision makers love the big picture. They're typically creative people who consider numerous options and look for patterns. They're comfortable considering the long-term and with risk management.

APPROACH: *Provide one or more high-level scenarios and develop them in the story. The focus is on concept rather than action. Ask these people to contribute ideas, but avoid asking them to review the details.*

Analytical

Analytical decision makers prefer details and enjoy analysis. Being able to drill into the details and to show traceability and the logical flow can be critical to their acceptance of a story. These people may need more time to process the detailed information than other styles of decision makers.

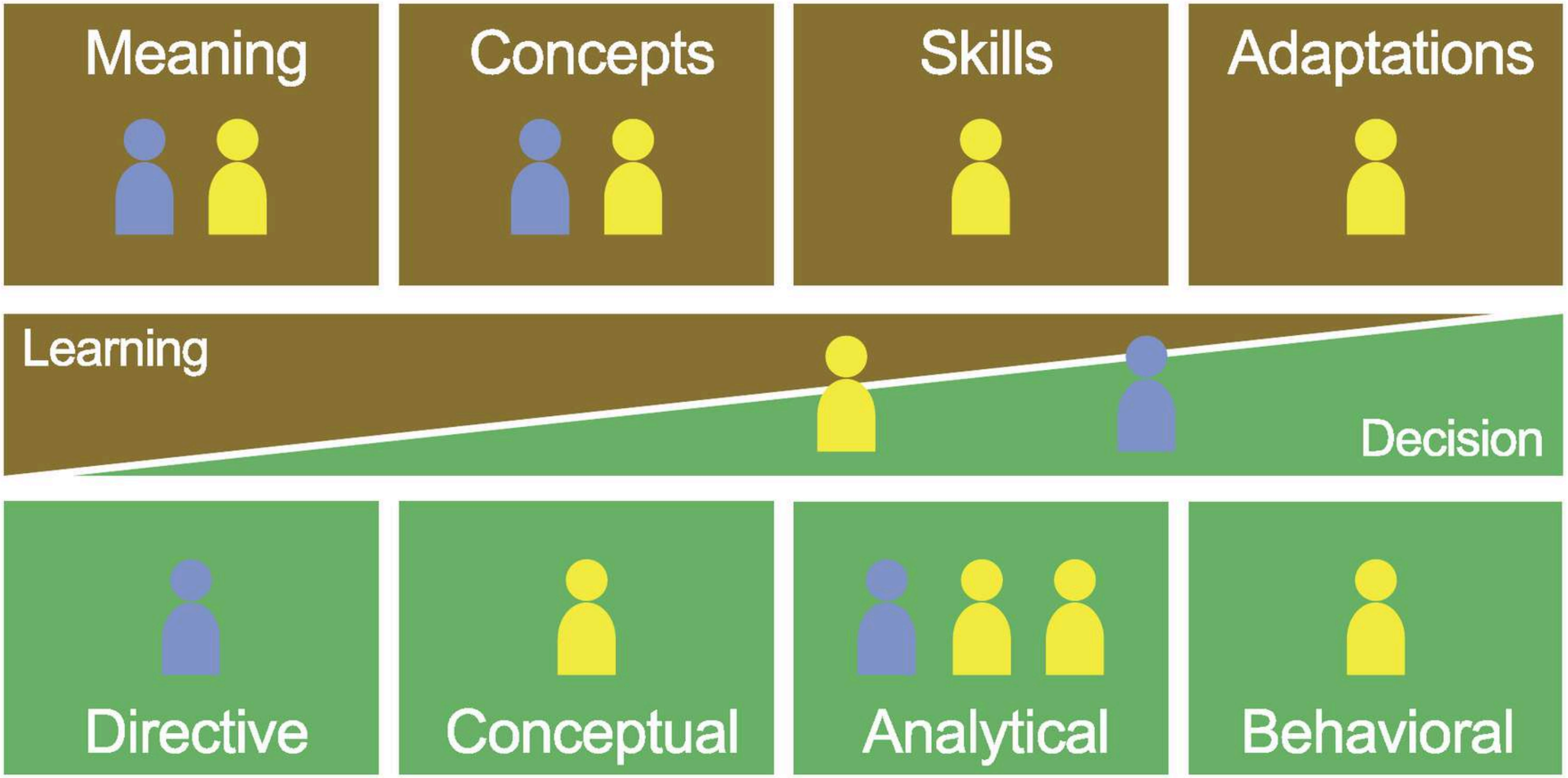
APPROACH: *Be prepared to answer questions. Everything does not need to be presented but should be available if required. Include these people in reviews only when you have enough details.*

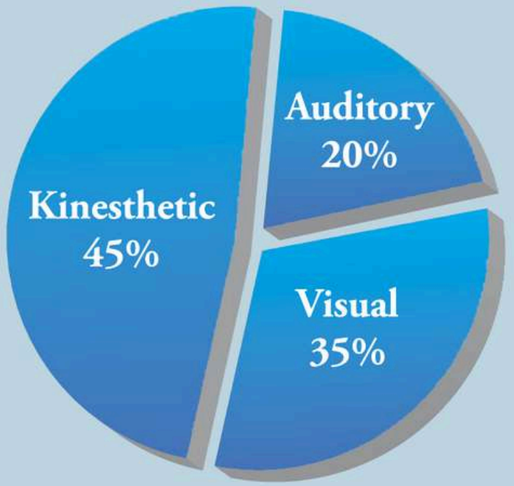
Behavioral

Behavioral decision makers focus on the impact on others and the organization. The low tolerance for ambiguity means they want clarity on how the change will affect individuals and the organization, focusing on the welfare of others and how they will feel about the change.

APPROACH: *Include descriptions of how the change will affect the characters in the story. The response of these people to the visual story may be intuitive and emotional. They often tend to avoid conflict and prefer open conversations to reach consensus decisions.*

Map your audience and decision makers





How Personal Trainers Like to Get Their Information

COVERING THE LEARNING STYLES

MEANING

To allow you to focus on your customers instead of business trivia.

CONCEPTS

Focus on business services (what are they) and how a training studio needs special business services.

SKILLS

Walk the audience through a scenario that shows how their life will change with Optimal Balance.

ADAPTATIONS

Emphasize different types of studio operations that can use Optimal Balance services.

DECISION STYLES

DIRECTIVE	CONCEPTUAL	ANALYTICAL	BEHAVIORAL
Cite statistics that show that personal training studios are a risky business.	Imagine a world where the trainer has time for his clients instead of paperwork.	Have a full package of information available to review, including forms and procedures.	Focus on how the clients will feel with new, efficient, modern procedures in place.

Marina considers the trainers and business owners she knows. She has some data from a study she participated in that used the VAK method, but since the presentation has to be given to people she doesn't know, she decides to include information designed to address each of the different styles.

Learning Styles

Meaning	Concepts	Skills	Adaptations
Allan Claus	Ralf Jane Franco	Bernd Karen	Luc
Allan and Claus both regularly ask about the reasons why in project review meetings, but spend little time on the implementation details.	Ralf is well known in the hospital for his analytical skills and the ability to describe the concepts for new ideas. Jane and Franco often pull in expert opinions and request further research.	Bernd is always keen to understand the process. Karen built her reputation in the hospital by creating change programs.	Luc's approach to change has been seen a number of times with the nursing teams to involve a series of small changes with regular checks.

The nurses are a very broad mix and will probably represent all the different styles for learning and decisions.

Gut feel – the visual story is a so/so split between learning about the options and driving a group commitment to make the changes happen.

Decision Styles

Directive	Conceptual	Analytical	Behavioral
Claus	Bernd Ralf	Allan Karen Jane	Franco Luc
Claus is results-oriented and drives the hospital through performance measures. His favorite saying is, "Be bright, be brief, be gone!"	Bernd and Ralf both have a similar style for decisions. They walk up to the whiteboard and sketch out the scope of the problem, working on the big picture to be sure they understand it before making a decision.	All of these people regularly sit in our meetings, checking the numbers and the traceability through the analysis in proposals. If anything does not fit, they will not make a decision without sending someone away to check the analysis.	Both Franco and Luc regularly ask about the impact of changes on their people before pushing forward with decisions.

Insights

Personal style – learn by doing (adaptations) and conceptual decision maker.

>> The audience covers the full range of styles, with only a small overlap to my personal style. Will need to work hard to cover all the styles in the visual story. At least the key decision maker is the same decision style!

CHECKLIST

- ☑ Identify the learning styles for the audience and specifically for key decision makers.
- ☑ Identify the decision styles for the audience and specifically for key decision makers.
- ☑ Look back at the power map for the audience and annotate with the learning and decision styles. Are there audience groups that have the same styles? If so, you might want to pull them together to hear a specific version of the story focused on their styles.
- ☑ Decide how much of your efforts should go into educating your audience compared with the efforts to influence their decision.

Visual Story Map

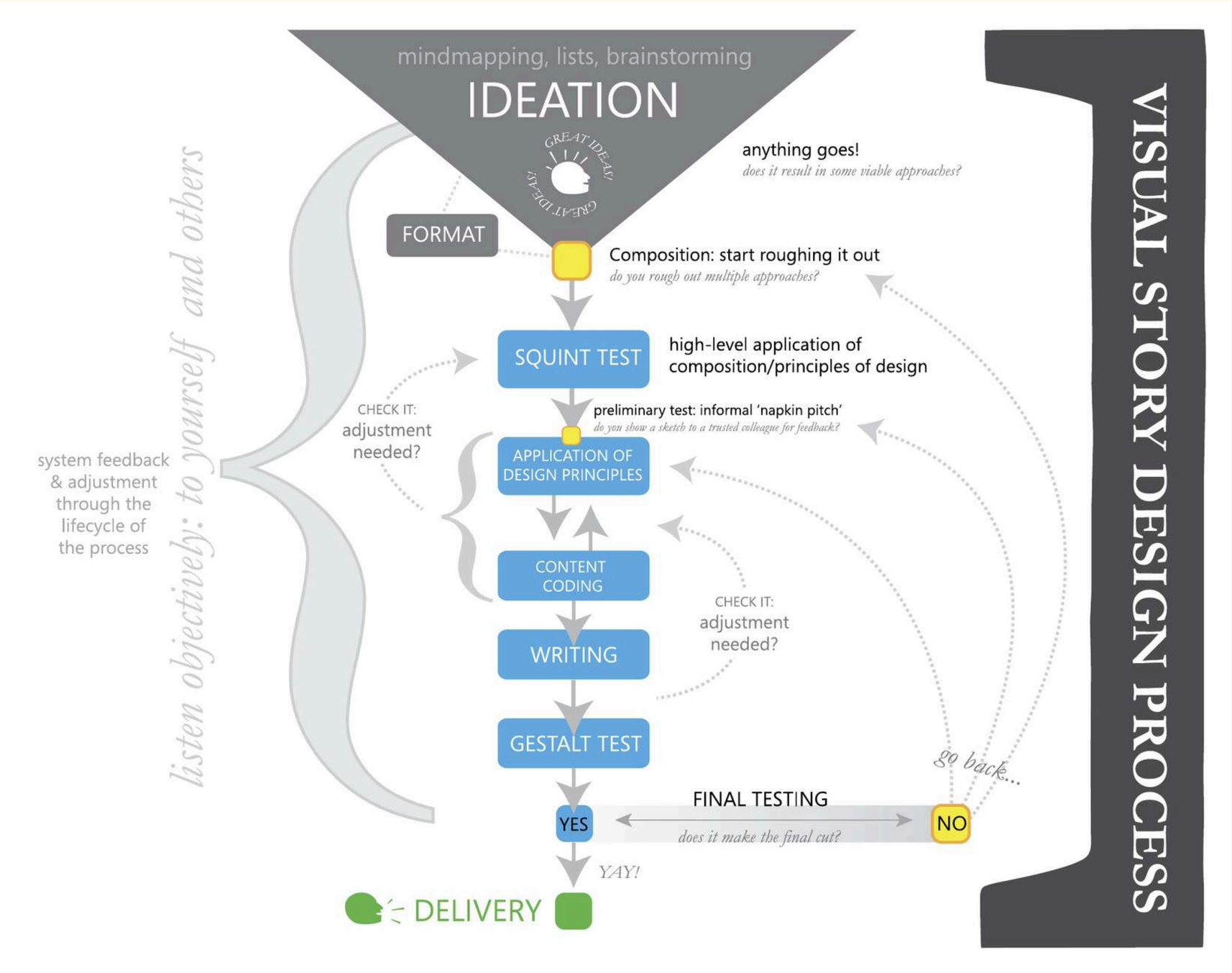
Stories That Move Mountains

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

Self study, Chapters 10 to 13

https://www.martinjsykes.com/storiesthatmovemountains

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

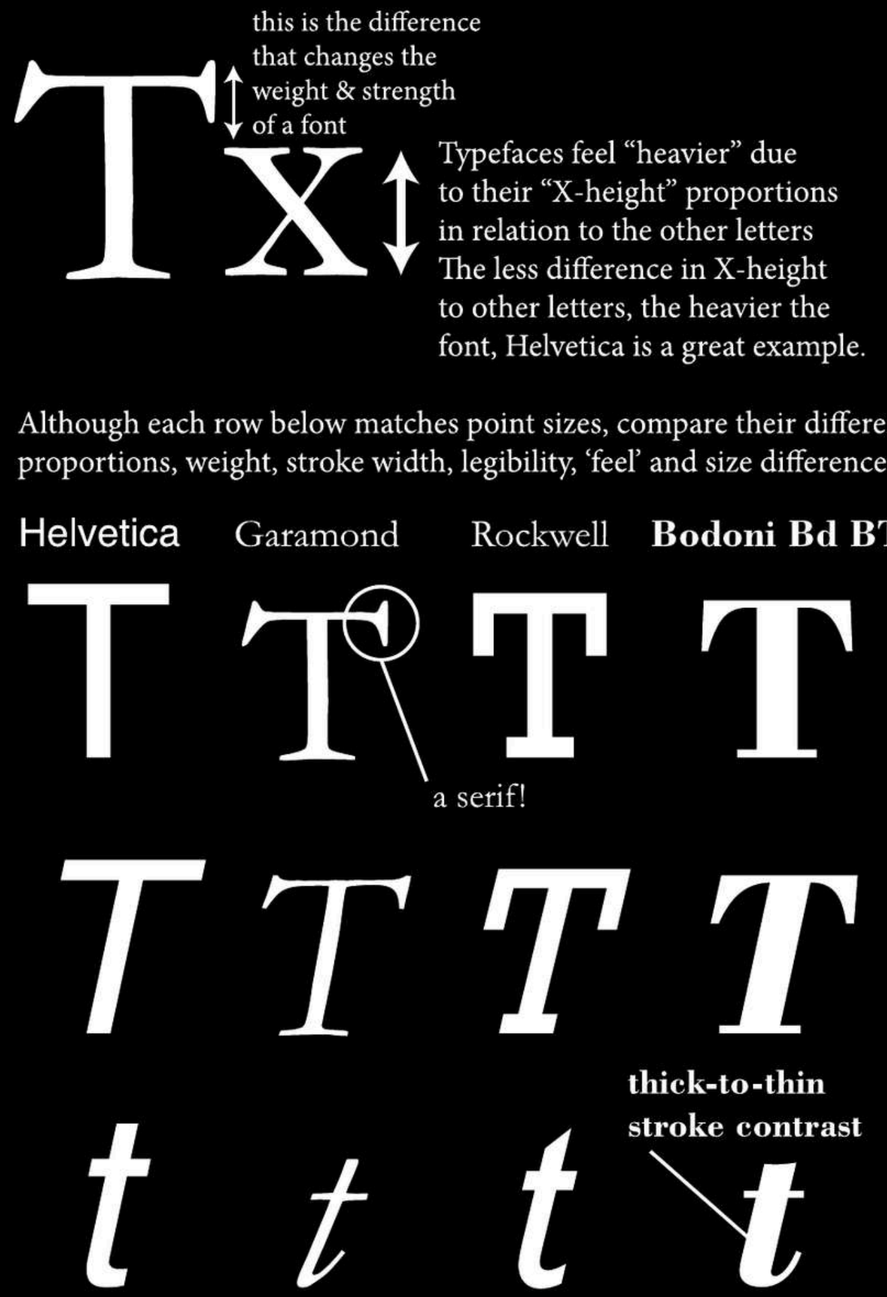

VISUAL STORY DESIGN PROCESS
mindmapping, lists, brainstorming
IDEATION
GREAT IDEA!
GREAT IDEA!
anything goes!
does it result in some viable approaches?
FORMAT
Composition: start roughing it out
do you rough out multiple approaches?
SQUINT TEST
high-level application of composition/principles of design
CHECK IT:
adjustment needed?
preliminary test: informal 'napkin pitch'
do you show a sketch to a trusted colleague for feedback?
APPLICATION OF DESIGN PRINCIPLES
CONTENT CODING
CHECK IT:
adjustment needed?
WRITING
GESTALT TEST
go back...
FINAL TESTING
does it make the final cut?
YES
NO
YAY!
DELIVERY
system feedback & adjustment through the lifecycle of the process
listen objectively: to yourself and others

#1200

Symbols/
Icon
emotion/message
Statement
works
in
All Sizes
Bold/
stands
out
No one
else has
done
Distinct
Unique
Rhythm
balance
Creative
Sustainability
Long
Lasting
Simple
Religion
Associate
Apple
Comp.

Typography

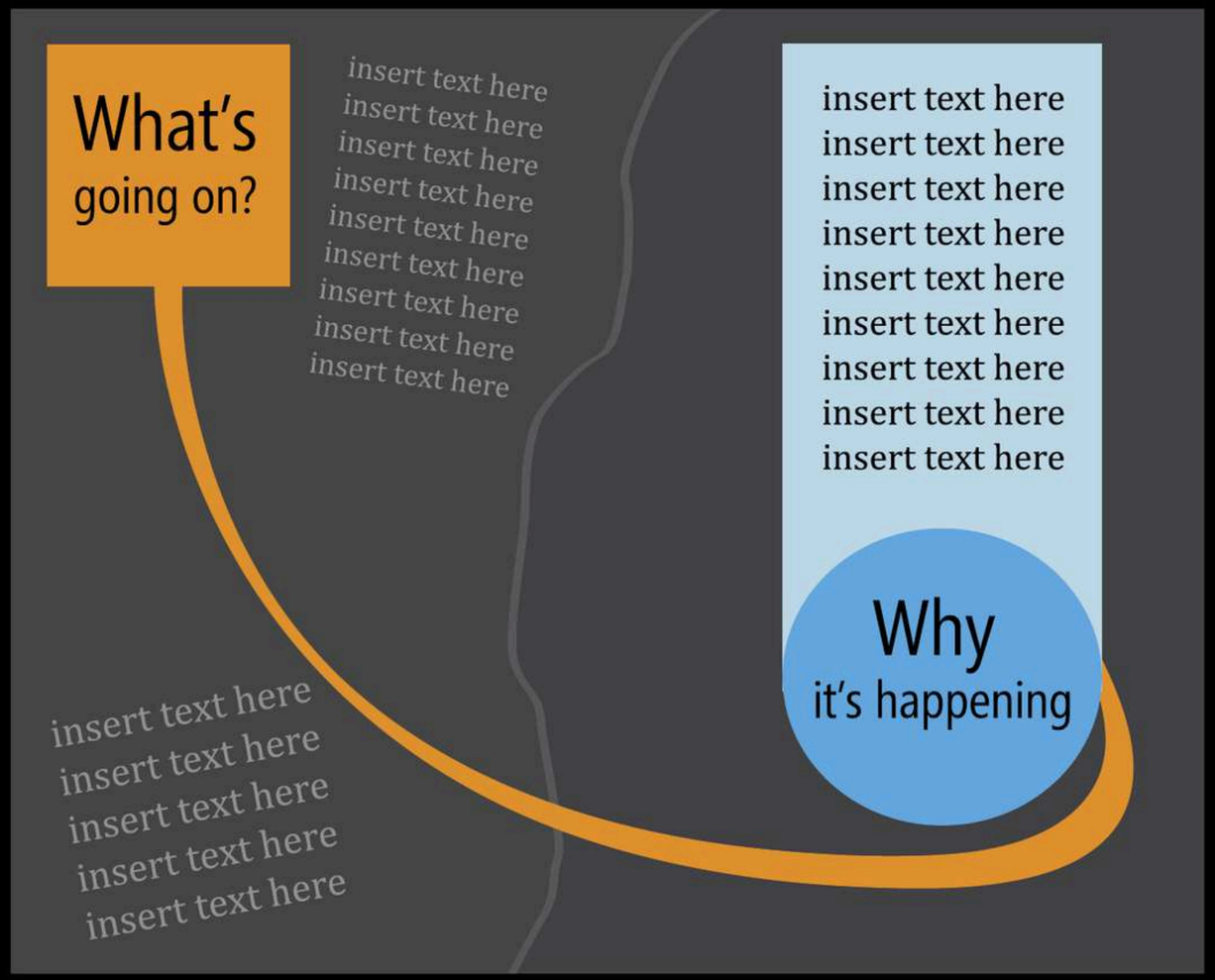
Typography


this is the difference
that changes the
weight & strength
of a font
Tx
Typefaces feel "heavier" due
to their "X-height" proportions
in relation to the other letters
The less difference in X-height
to other letters, the heavier the
font, Helvetica is a great example.
Although each row below matches point sizes, compare their different
proportions, weight, stroke width, legibility, 'feel' and size differences
Helvetica
Garamond
Rockwell
Bodoni Bd BT
T T T T
a serif!
T T T T
thick-to-thin
stroke contrast
t t t t

Warm colors attract attention, don't assume red is always best

Explanatory text of the "problem" is separated by a "messy" uneven line

Blue is used as a "resting" point to calm the viewer. Cool greens and blues work well for this.



Warm colors also signal "alarm" or caution... "the pain."

Gray for the background, to avoid getting in the way of potential color coding. Not only do the colors used work as notated, but choose appropriately, based on the "coding" of your audience. Keep an eye on saturation.

Text gets larger, coming forward to bring movement and depth to the composition.

Also assisting the rhythm and flow of the composition is the orange line; note the variation in line weight to create a more dynamic visual. An arrow could be used here, but this can often be a more interesting approach.

BLUE

UK/US: calming, peace, masculinity, conservative, corporate, gentleness, wisdom, inspiration
CHINA: immortality, femininity
RUSSIA: loyalty, honesty, faultlessness, wisdom

PURPLE

UK/US: royalty, spirituality, wealth, fame, honor, arrogance, dignity
JAPAN: privilege, wealth
BRAZIL: death and mourning

RED

UK/US: energy, excitement, love, passion, warning, stop, anger, aggression, power, danger, strength
CHINA: good luck, celebration, ceremonial and festive color
RUSSIA: Bolsheviks and Communism

YELLOW

UK/US: imagination, energy, optimism, happiness, honor
CHINA: sacred, imperial, royalty, honor, masculinity
GREECE: sadness

Limited Use of Bullet Points

Intentional Icon and Symbol Choices

Photographs, for Content and Color

Use of a Visual Hook

Bring Humour and Style through Cartoons, Illustrations and Line Drawing

Limited Use of Bullet Points

Intentional Icon and Symbol Choices

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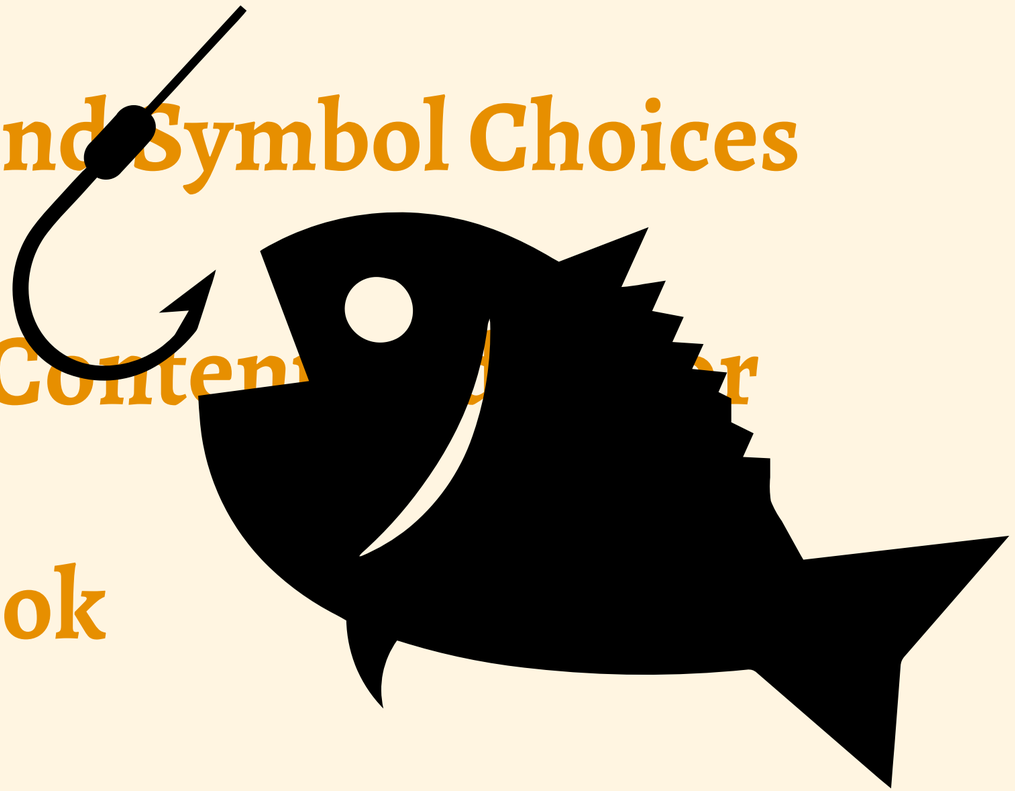
Photographs, for Content [illegible] r

Use of a Visual Hook



Bring Humour and Style through Cartoons, Illustrations and Line Drawing

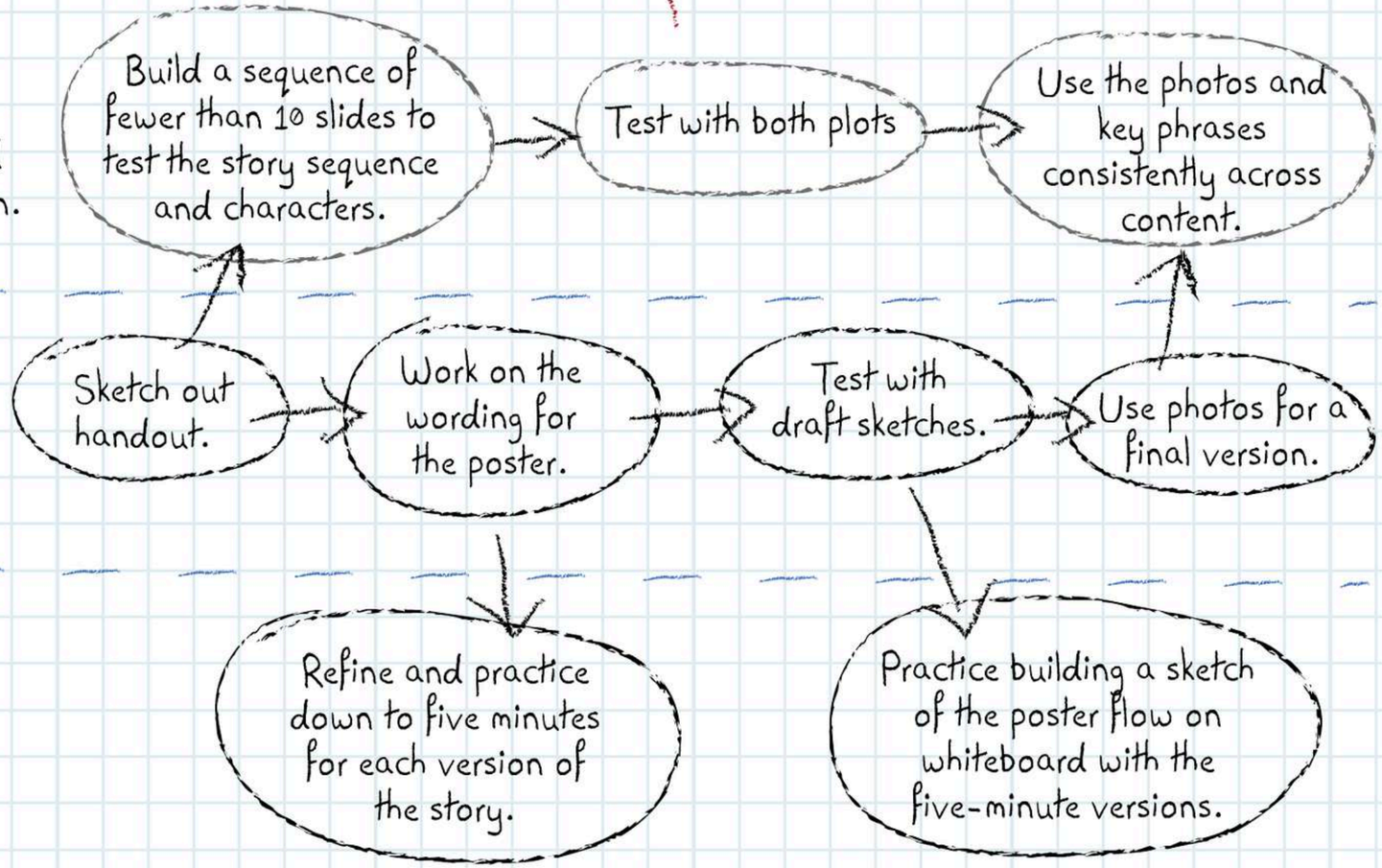
Putting it all together with the Gestalt test

Probably have different first and last slides for each story to focus on the Sense of Urgency, but keep the same core set.

Need to create a small test group to try presentation and poster with as we build it.

Formats

- ☐ Draft presentation for early meeting – then build into the final presentation.
- ☐ A one-page poster / handout for the nurses and final presentation.
- ☐ Quick version to talk to someone in just three minutes and get the key points across.



Need a sharp title to go here!

Sense of Urgency goes here.

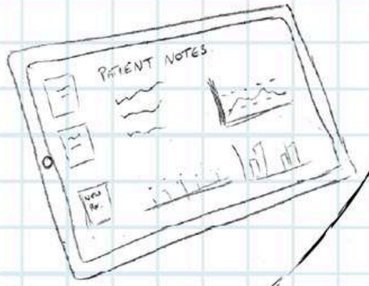
Text here to note some of the current issues – such as handwriting of patient notes on printouts.

Text here to note some of the future opportunities, including capturing handwriting electronically.

Closing message. This change depends on the nurses.

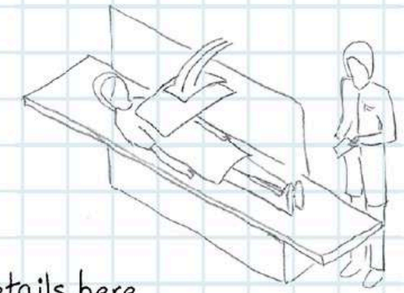
Reception nurse taking details from a patient on arrival.

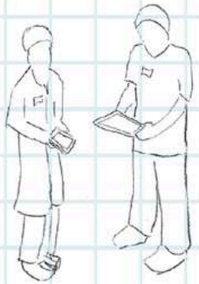
Text here to talk about the migration of existing data.

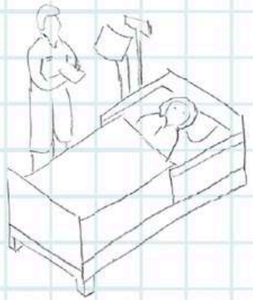


Explain how the patient data improvements allow for better patient care and fewer insurance claim rejections.

Introduce Sharon taking notes while a patient has a scan.







Put in some details here about the challenges the nurses and doctors will face with the changes.

Sharon talking with a specialist to modify the care plan for a patient.
Updating the patient details as they talk.

Patient alarm on automatic monitoring equipment sounds late at night. Fortunately a false alarm, but the nurse had all the patient details immediately and the incident logged automatically.

The Optimal Balance system helps fitness studios *thrive,* and lets personal trainers get back to doing what they *love.*

Optimal Balance

I love helping people get fit and lose weight. I have spent a lot of time training to be a personal fitness trainer. I know that if I do a good job of training people, they will come to my new studio.

It is hard getting enough new members to make money, and my existing members are leaving. Large gyms are cutting into my business. Billing issues are wearing me down. Running a business shouldn't be this difficult.

I rely on my trainer, but he needs help to run this business!

I am spending all my time dealing with business issues. I don't have time to create training plans or train clients. This is not the job I wanted to have.

Optimal Balance can help you deal with your business issues.

I have time for my clients now! My clients are happier because I'm spending time working on their fitness while Optimal Balance deals with boring, but important, business details.

SCIENCE-BASED PROGRAMS

While you are free to create your own programs, you can also take advantage of our programs developed from years of behavioral science research.
Our programs:

- Avoid up-front fees
- Encourage tracking
- Allow trainers to assign programs electronically

COMPETITION

from large gyms can be a challenge. Optimal Balance helps you compete. Your clients can train at any studio in the network, and if a client from another studio trains with you, you are reimbursed. In addition, your studio can collect medical insurance, sell supplements and accessories, and work with local physicians to get client referrals, revenue channels that only the largest clubs can otherwise take advantage of.

HOW MUCH DOES OPTIMAL BALANCE COST?

Optimal balance charges a small transaction fee on membership dues and on transfer reimbursements. Simple monthly reports detail all charges, while your net membership dues are automatically deposited into your business account. It couldn't be simpler.

SERVICES TO CHOOSE FROM

We serve the needs of fitness studios, clubs, and spas, including:

- Automatic billing
- Friendly phone service
- Legal forms
- Web marketing
- Pay for training network clients
- Insurance claims
- Supplements
- Physician referrals

JOINING IS EASY

Once your studio joins the Optimal Balance network, a project coordinator will create a plan to address four changes.

- Free staff training
- New paperwork forms
- New membership cards and card scanner
- Updates to your studio's website

Delivering the Optimal Balance Story

Dark Power

The story starts with some background on the current state of the fitness studio industry. The data includes how many studios fail each year, and the reasons why they fail.

Introduce the theme that many personal trainers suffer from a lack of time to give attention to individual clients because of the time required to manage the business.

Temporary Success

Introduce Randall, a personal trainer who thinks that he can successfully run his own business, based on his experience as a trainer in another gym.

He begins well with existing clients from his old gym, and some friends and family. They are very forgiving of early missteps, and the business seems to be a success.

Living Death

Contract problems and billing mistakes are reducing customer satisfaction, which in turn reduces his referrals and new clients. It takes more effort to run a business than Randall thought.

Apparent Triumph

Introduce Penny, who tells Randall about the services her company uses, and helps him find out about Optimal Balance.

Introduce Frank as a fellow trainer and studio owner. Randall is convinced that he doesn't need outside help as Frank explains the systems he has created over the years to run his business.

Miraculous Redemption

Randall thinks he will be successful if only he can copy Frank, and begins to spend every evening at the gym, working late, trying to catch up on paperwork.

Penny plays Randall the Optimal Balance video and shows him the visual story. Randall arranges a one-to-one meeting and finally understands the benefits and how it will change his life.

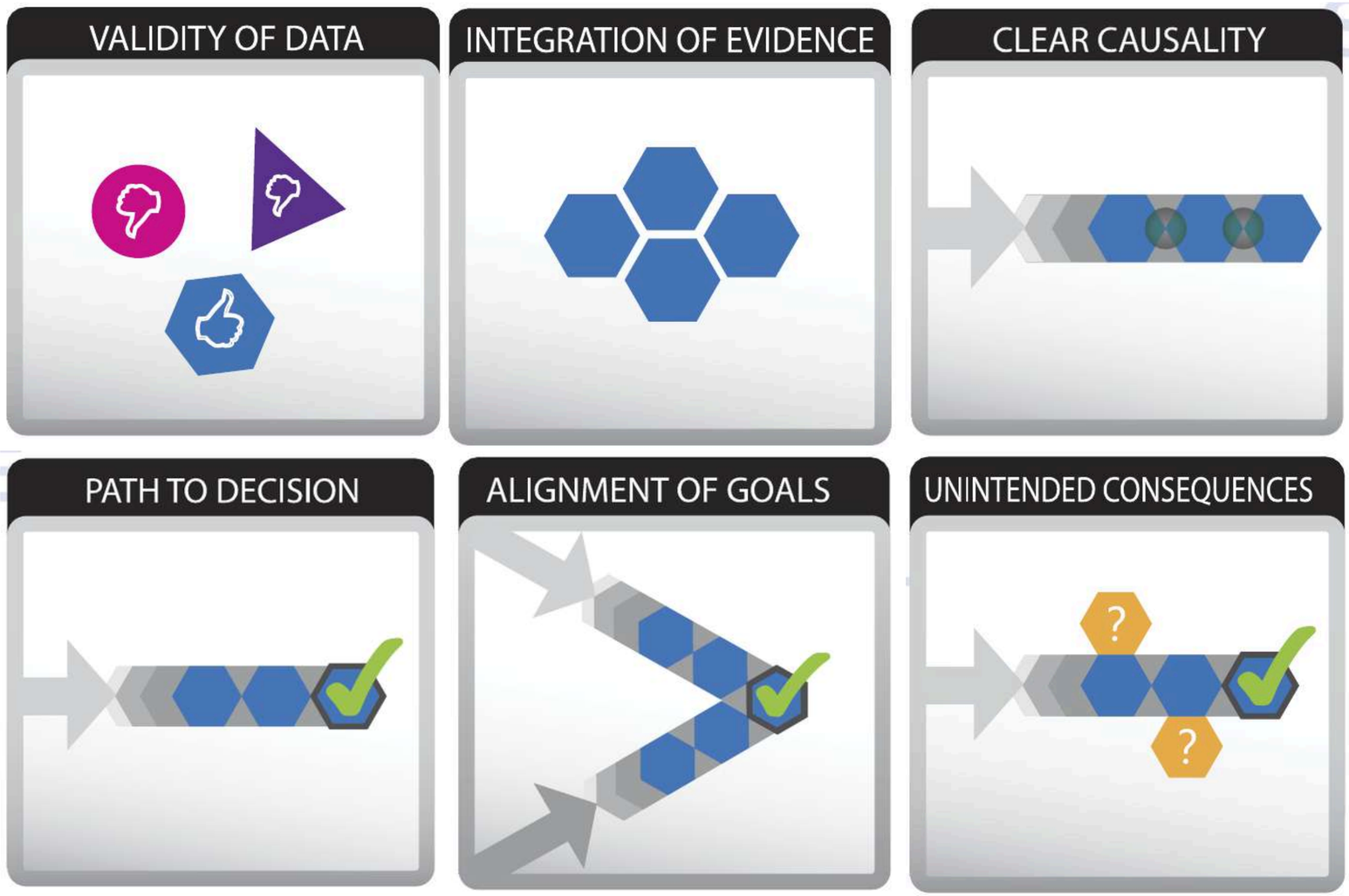
Randall buys Optimal Balance services and soon has time to dedicate to training clients and getting people excited about their own health.

The End

Finish with a sense of urgency based on the stress and effort that studio owners are facing. For personal trainers, overcoming physical obstacles can be far easier than overcoming the mental challenges that make it difficult to keep doing routine business tasks when they really don't enjoy them. It's just a matter of time before they quit.

CHECKLIST

- ☑ Choose the formats to support your delivery plan.
- ☑ Mindmap or brainstorm relevant creative approaches (with several people if possible).
- ☑ Create a one-page visual story around your story framework and core characters.
- ☑ Run through the Visual Device Checklist to determine the best way to code the content (this can be done together with creating the one-page visual story).
- ☑ Create a rough draft of your presentation and put it in front of your test audience before your ideas become too set.
- ☑ Refine the visual approach, add a little writing, test again, and keep repeating this cycle.


VALIDITY OF DATA
INTEGRATION OF EVIDENCE
CLEAR CAUSALITY
PATH TO DECISION
ALIGNMENT OF GOALS
UNINTENDED CONSEQUENCES
?
?

Have you made compromises in order for the visual story to satisfy particular audience members that will weaken the impact for others?

Do you explain away problems instead of explaining how to resolve the issues?

Is it possible for the different members of the audience to reach different conclusions that will lead to conflict later?

CHECKLIST

- ☑ Check the validity and credibility of your data.
- ☑ Be clear on the relationships and integration of your data.
- ☑ Be sure you have a clearly defined causal relationship from each part of your story to the next part.
- ☑ Check that your visual story leads to a clearly defined decision or request for the audience to act.
- ☑ Look for compromises or messages for specific audience members that may lead to different outcomes.
- ☑ Consider the potential unintended consequences of the change or decision you are proposing.