The Dialogue Mapping Experience[1]

by Jeff Conklin

One of the first things we do in our training workshops is to have a demonstration Dialogue Mapping session. We pick a nice wicked problem like reducing violence in schools or ending world hunger and I facilitate and Dialogue Map the class's discussion on the topic for 10 or 15 minutes. This lets everyone directly experience what the "target" is in terms of what the Dialogue Mapper is doing and what it feels like to be a participant in such a session. It gets us out of conceptualizing about design and into the concrete reality of people trying to talk to each other about a messy but important topic.

This chapter is that demo session for you. OK, sure, it's still like reading about skiing instead of actually *skiing*. For this chapter to work you have to sort of give yourself to it … *pretend* you're having the experience of being in a real meeting!

Pretend you work for a medium size software company named "SpinCo" and you care about the company and your job. At the end you can have your *real* company and job back.

OK? Here we go …

You are barely on time for the meeting. You enter the meeting room with your notebook and pen and some mail to read in case things drag during the meeting. You've been thinking about suggesting a new product idea for the company, but you suspect it won't be easy. There is already a lot of confusion in the marketplace about what business SpinCo is really in, and a new product could make matters worse. Plus there a few people coming to the meeting who are dedicated to their own products, and will probably perceive anything new as competing for scarce investment resources. But, it's not like *their* products are doing so well, and the company definitely needs something to give it focus and momentum. You'd like to get some discussion of your idea, but the last time someone brought up a new product idea there was a lot of resistance to

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[1] This paper is Chapter 3 in the book *Dialogue Mapping: Building Shared Understanding of Wicked Problems,* John Wiley & Sons. For more information see the CogNexus Institute website at http://cognexus.org.

even considering it, and the meeting dragged on without really going anywhere. You could have really used a stack of mail at *that* meeting!

As you settle in your seat you notice someone new at the table, with a notebook computer in front of him. His computer is connected to a display projector. Is there going to be a demo at this meeting?, you wonder. The new guy is sitting next to Beth, who called this meeting. Beth is a good manager – she's got a good head, has some seniority in the company, and knows a lot about technology. Sometimes her meetings get lost in the weeds, and she tends to go on sometimes, but at least when she does she's passionate about what she says. Beth introduces the new guy, Jamie, as a facilitator who will use the computer to help keep the meeting on track. She explains it's an experiment, and she's interested in feedback from the group on how it goes afterward.
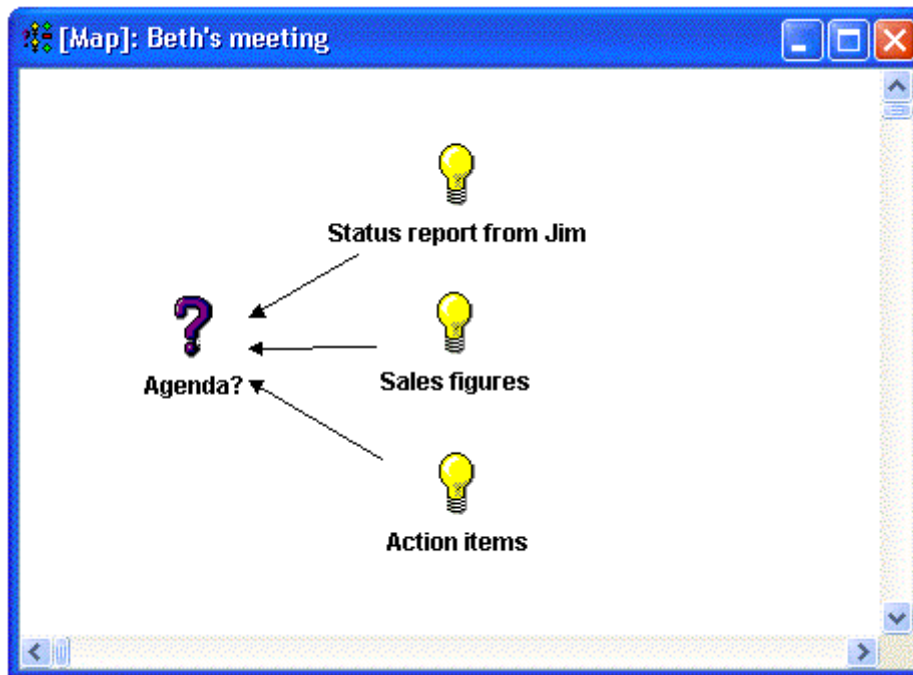

Figure 1: The original IBIS agenda map for Beth's meeting

Jamie flips on the screen and you see the agenda for the meeting, but it's not in PowerPoint. There are icons with text under them (see Figure 1), and arrows connecting the icons together. On the left is a question mark icon labeled "Agenda?" and connected to it on the right are several light bulb icons with labels like "Status report from Jim", "Sales figures", and "Action items". (Why do the arrows go backward?, you wonder.)

Jamie reads through the diagram, and then asks if there are any other items for the agenda. So far, it's pretty clear what he's doing, although it not clear that the group needs all this technology for this – the agenda is really simple. There is a pause, so you think, What the heck, and you say that you have got a new product idea that you would like to propose informally. You half expect Beth to say that she doesn't want to discuss new products today, but she is looking at the screen. Without any pause Jamie says, "What kind of product?" "It would be a service, sort of like our XIT offering," you say, doubting that Jamie knows anything about XIT. Without hesitating, Jamie creates a new light-bulb icon and labels it "New service product idea". Then he links it to the "Agenda?" question. Well, you think … at least he's listening (see Figure 2).
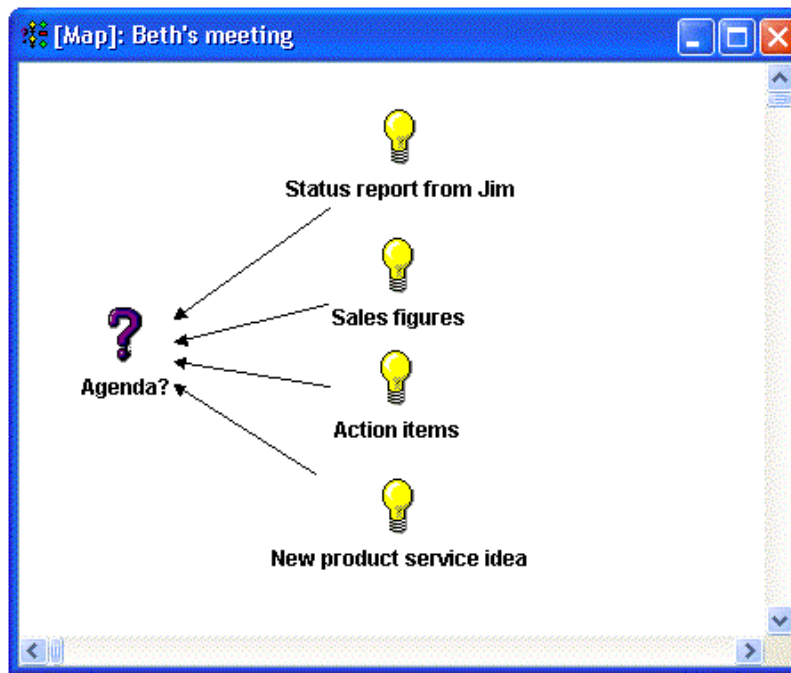
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Figure 2: A new agenda item is added

You sit up a little more in your chair. Okay, you're committed now. You notice that Burt, the XIT product manager, is looking at the screen, and you think you can hear him sharpening his knives for a battle. Burt's good, he really knows his stuff, but he can be pretty argumentative.

Jamie asks if there are any other items for the agenda, but no one else speaks up. You look at the screen and think, "That's not a big agenda … I might just get called on to present this idea." You open your notebook and start making notes of the key things you want to say.

Jamie calls for the status report from Jim. At the same time, he creates a new icon on the screen, labels it "Jim's status report" and then opens up a new blank window. As he's typing he asks Jim, "What's the name of your project?" Jim replies, "Deli-quick." Jamie quickly creates a new question icon, labels it "Status of Deli-quick?", and then stops and looks at Jim (see Figure 3). You notice that Jamie seems very comfortable with his role. He seems alert and energetic.
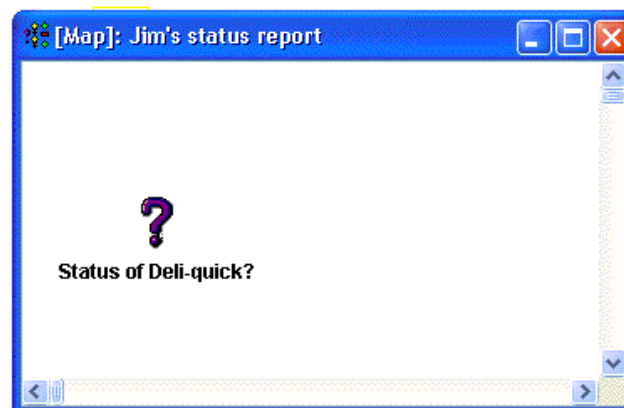

Figure 3: The beginning map for Jim's status report

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Jim says, "I guess everyone knows that there's been a problem with our ASP, InfoServe. At the beginning of the month they were two weeks behind schedule on our design review, and it was beginning to put our schedule at risk. That's all we needed, was another delay." As Jim speaks, Jamie is typing. An idea icon appears, and the label beneath it taps out "InfoServe was 2 weeks behind schedule" (see Figure 4). Jim goes on, "So we had a meeting with them on Monday, and they were very aware of the problem, and very apologetic, and they are going to give us a Beta release right away and have the final release by the end of the month."
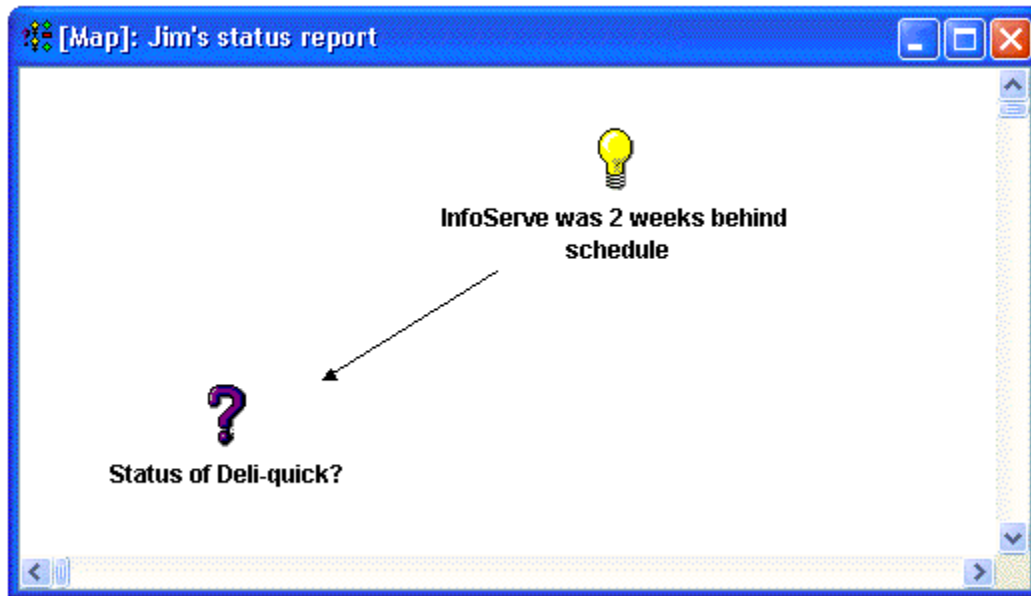

Figure 4: A new node is added to Jim's status report map

Jim starts to go on, but Jamie quickly interrupts. "So, you'll get the Beta release right away" and a new idea icon appears labeled "Will get Beta release right away". "Do you know when you'll get it, Jim?" Jamie asks. Jim responds, "They said by close of business on Friday." Jamie deletes the "right away" and taps in a few letters – the new label says "Will get Beta release by COB Friday". Jamie asks "Is that right?" and Jim nods, saying "Yeah, and the final release by end of the month." As he's typing, Jamie says "Good. Right. Got it." and a new idea appears labeled "Will get final release by end of March" (see Figure 5). Jamie glances up at Jim and asks "Is there anything you're supposed to do to make that happen?" and Jim shakes his head slowly, "No, we didn't commit to do anything." Jamie nods and says "OK". Jamie seems to be tracking the conversation closely. You wonder if he's been in the ASP business for a long time – he seems to be pretty familiar with it.
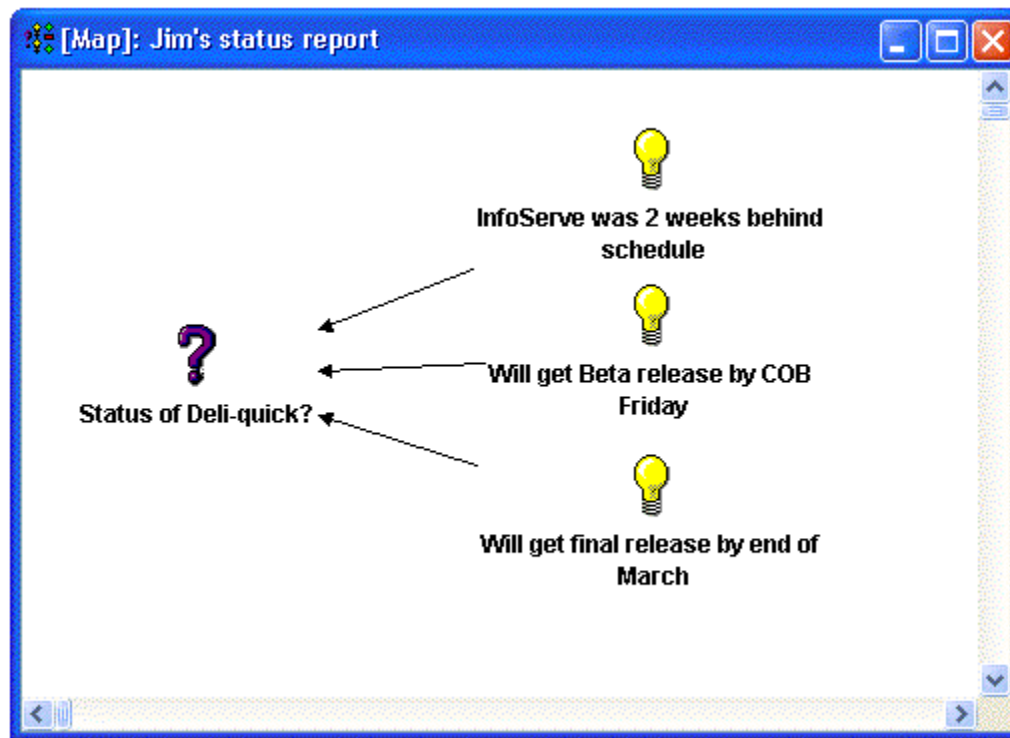
Figure 5: A snapshot of Jim's status report map

As the meeting goes on, Jamie continues to capture the main points that each person is making, sometimes as questions, sometime as light bulbs, all connected together. You notice that even if your mind wanders, you can glance up at the screen and see the flow of the conversation in the diagram. As the map gets bigger, there's a sense of progress. There's also a sense that the group is more focused, everyone seems to be paying attention. Usually by now there would have been a couple of side conversations that distracted the group from the purpose of the meeting.

Your agenda item is next. Just as he has done with the other topics, Jamie creates a new empty map, opens the window, and creates a new Question icon. He pauses and looks at you. "I'm going to make this an open question, so we can capture the whole conversation, but the intent is to capture your idea as fully as possible, OK?" You nod, and he types "What new products should we consider?" "Tell us about it," he says to you. He seems to be interested, which makes it a little easier to press on.

You glance at your notes. "This started out from a lunch conversation with Heidi. She was telling me about an incident with one of her SpinFast clients, and it struck me that with SpinFast and some of our other products, we are basically leaving money on the table. These clients are all trying to do some strategic planning around acquiring and rolling out our products, but we have to send them elsewhere for help with the planning process. And by now we've seen enough of it that we're practically experts – we certainly know how *not* to do it!"

As you pause, Jamie says "So the new product would be a strategic planning service?"

"That's right", you say, "IT system rollout strategic planning." Jamie starts typing a new light bulb "IT system rollout strategic planning".
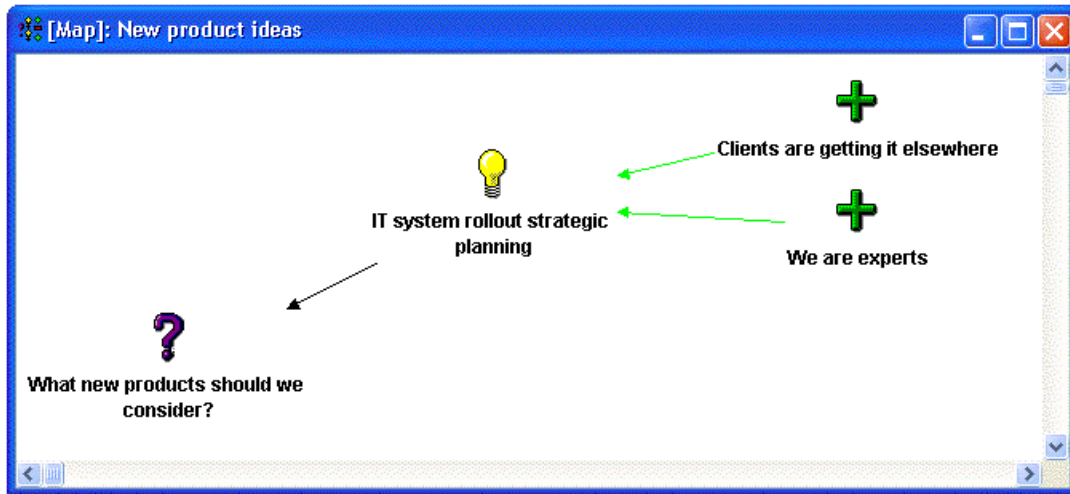
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Figure 6: A new product idea and two supporting arguments

Jamie says, "And I heard you say that clients need it and have to go elsewhere, and we're becoming experts at it." Near the light bulb, Jamie creates two new icons, big green plus signs, and labels them "Clients are getting it elsewhere" and "We are experts" (see Figure 6). As he is typing you elaborate. "That's right – this SpinFast client had to hold up the whole rollout because they couldn't find anybody, evidently, to take their organization through the kind of process that worked so well for the Zephyr folks last year."
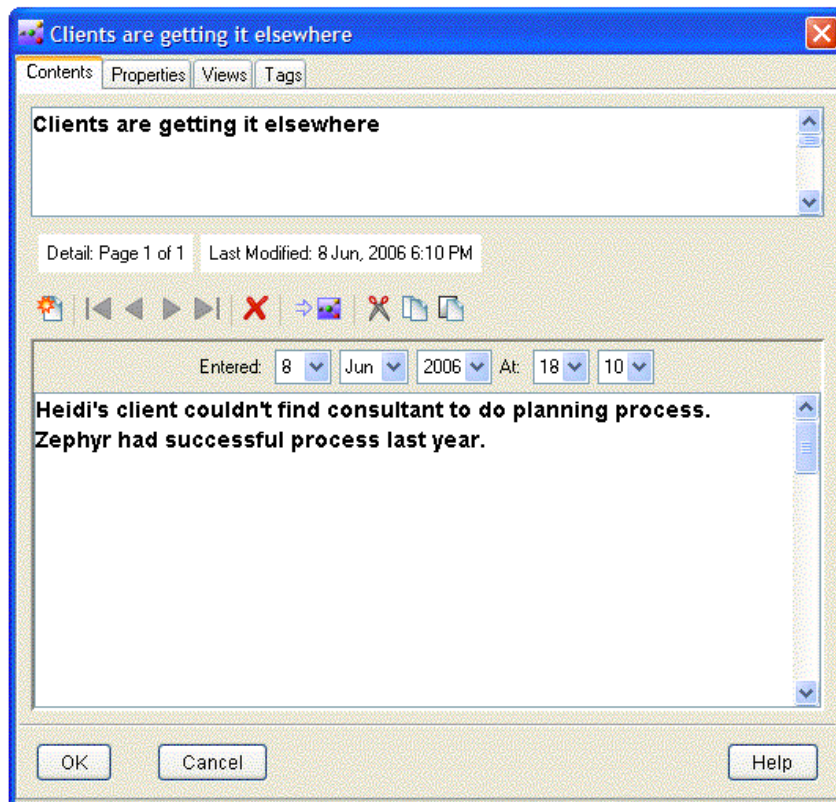

Figure 7: Every node can have a detail, like the text of an e-mail

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Jamie has double clicked on the big green plus icon labeled "Clients are getting it elsewhere" – opening up a new "Node Contents" window that sort of looks like an email message. In the big part of the window called "Detail" he has been typing.

"Hang on just a sec," he says. "Here's what I've got so far: 'Heidi's client couldn't find consultant to do planning process. Zephyr had successful process last year.' Is that right? Does that capture it?" (See Figure 7)

"Yes," you say, "Zephyr is a good example of a planning process that ran well. We were there, we watched what their consultants did, and they got a lot of good input and buy-in to the system before it was rolled out."

"Ohhh, I get it," Jamie says. He deftly moves the text "Zephyr had successful process last year" to the Detail of the "We are experts" node, and then types "and we learned how from watching it." As he's typing he reads out loud, glancing at the screen and ends saying "Is that it?"

"Well," you say, "I don't think we're experts. It's just that we've seen it done a lot and we pretty well know how to do it."

Jamie quickly replaces "We are experts" with "We know how".

"Okay?" he says, looking at you.

"Yep, that's it."

You are about to go on when Burt says, "I have one small question here." in that way that means "That is a dumb idea and I'm gonna show you why."   You have heard his "small questions" before and you know what is coming.
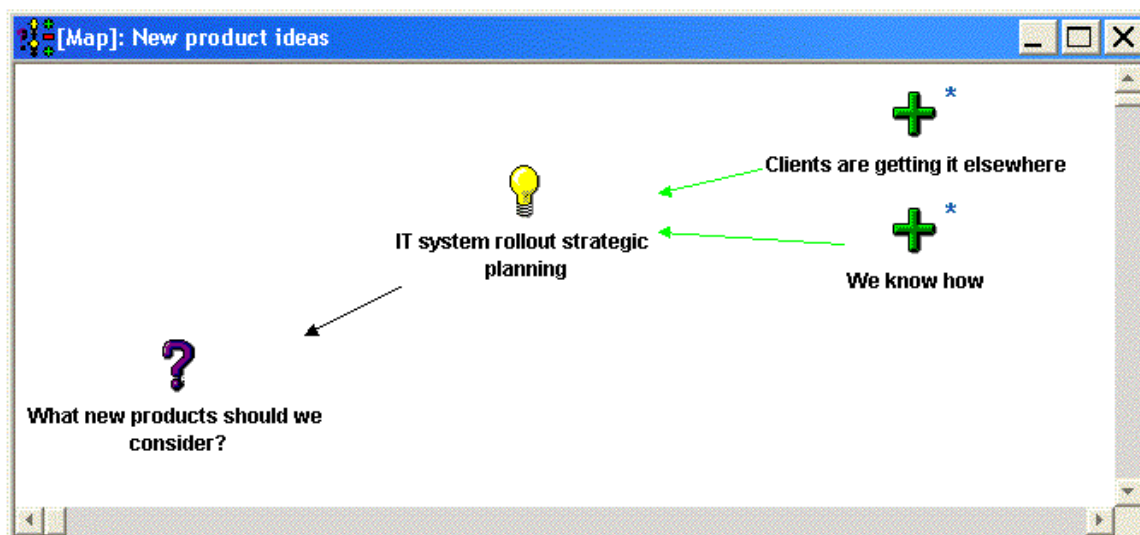

Figure 8: A node's 'Detail' can be read out directly from the map

But before Burt gets any further Jamie quickly says, "Sorry, hang on just a second. I'll be right there." Then glancing at you as he turns to the screen Jamie says, "So, here's what I've got so far. I just want to check it."

Speaking quickly and motioning on the screen (see Figure 8) with the cursor, Jamie says, "The proposal is for a new service that does IT rollout strategic planning, and so far there are two plusses for this idea, one is 'Clients are getting it elsewhere' and the other is 'We know how'." (You notice that when he puts the cursor over the 'We are experts' plus icon you can see the text about Zephyr in a line across the bottom of the screen.)

"Oh, yeah," Jamie says while opening up the upper green plus labeled "Clients are getting it elsewhere". As he types he says, "And we're leaving money on the table." (See Figure 9)
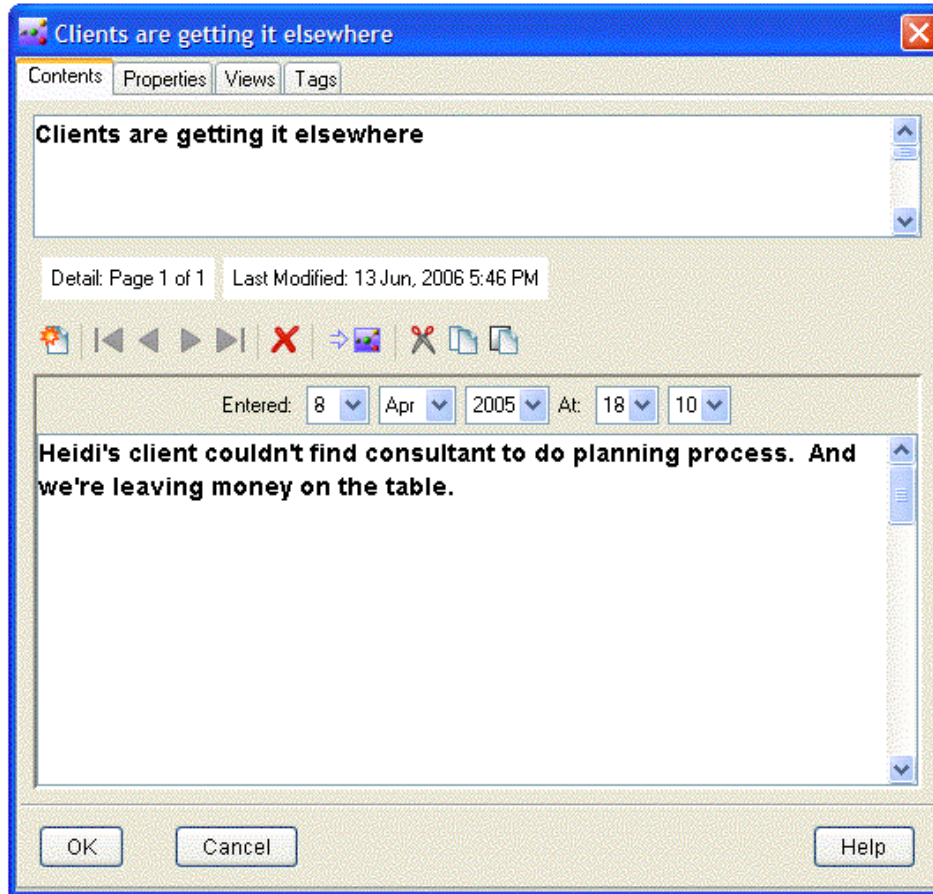

Figure 9: Updated Detail of first Argument

"Right?" he says glancing at you.

"Right!" you respond. Beth is looking at the screen and nodding, and so are several others. It's impressive that Jamie has distilled your idea into just a few nodes – it's very clear and, you think, pretty compelling.

Turning back to Burt, who isn't nodding, Jamie says, "Sorry. You had a question."

"Here's my question," Burt says. "We started out as a software company, and most of our products are software products. We *know* how to do software really well. We aren't a bunch of consultants. I mean, the whole thing these days is that we're trying to focus, because we've been so scattered. So who is going to do this strategic planning consulting? You??"

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He's looking right at you, but before you can respond, Jamie intervenes.

"Let me see if I got that," he says. On the screen is a new icon, a big red minus sign. "I captured that as an objection to the idea."

"We are a software company," he says, pointing with the cursor.

Jamie adds, "I also heard you suggest that we don't have the staff to do that kind of consulting." He creates another con node and labels it "Don't have consulting staff." He links both of the "con" nodes back to your idea.

"Well, that's true … at the moment," you say to Burt. "That is the obvious challenge with this idea."

"So, is there a question, like 'How to get consulting staff?' about this proposal?" Jamie asks the room. Both you and Beth respond, "Yes." Jamie creates a new question and links it to the idea (see Figure 10).
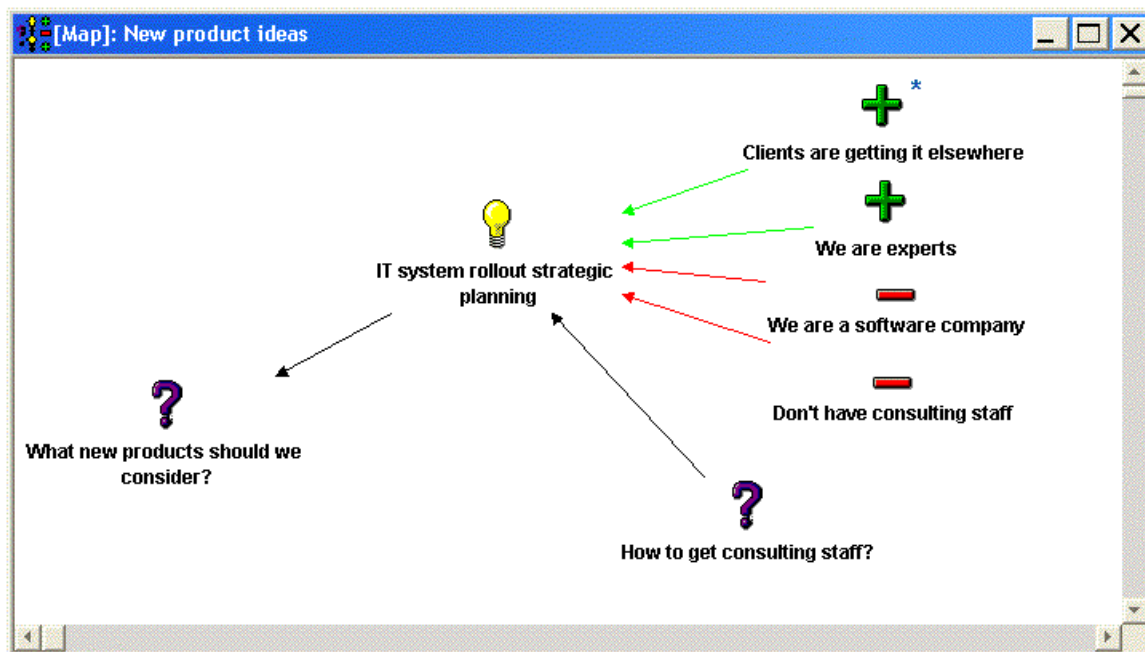

Figure 10: Final new products discussion map

"It's almost three, and I've got another meeting," Beth announces. "This has been a really productive meeting. I'd like to thank Jamie for coming, and I'd like to get any input that anybody has. There's a possibility SpinCo will start using this process in our meetings. Just send me email with your thoughts."

Turning to you, Beth says, "I like your idea. I think you're right that we're leaving money on the table. But if I'm going to take it to upper management I'm going to need more clarity about how it would impact our staffing. Let's think about how we might get into that business, and discuss our staffing options at our meeting next week. OK?" As you nod she says, "Thanks, everybody."

Jamie is busily typing. As you stand up he says to you, "I'll send you this map in email, including the action item" (see Figure 11).
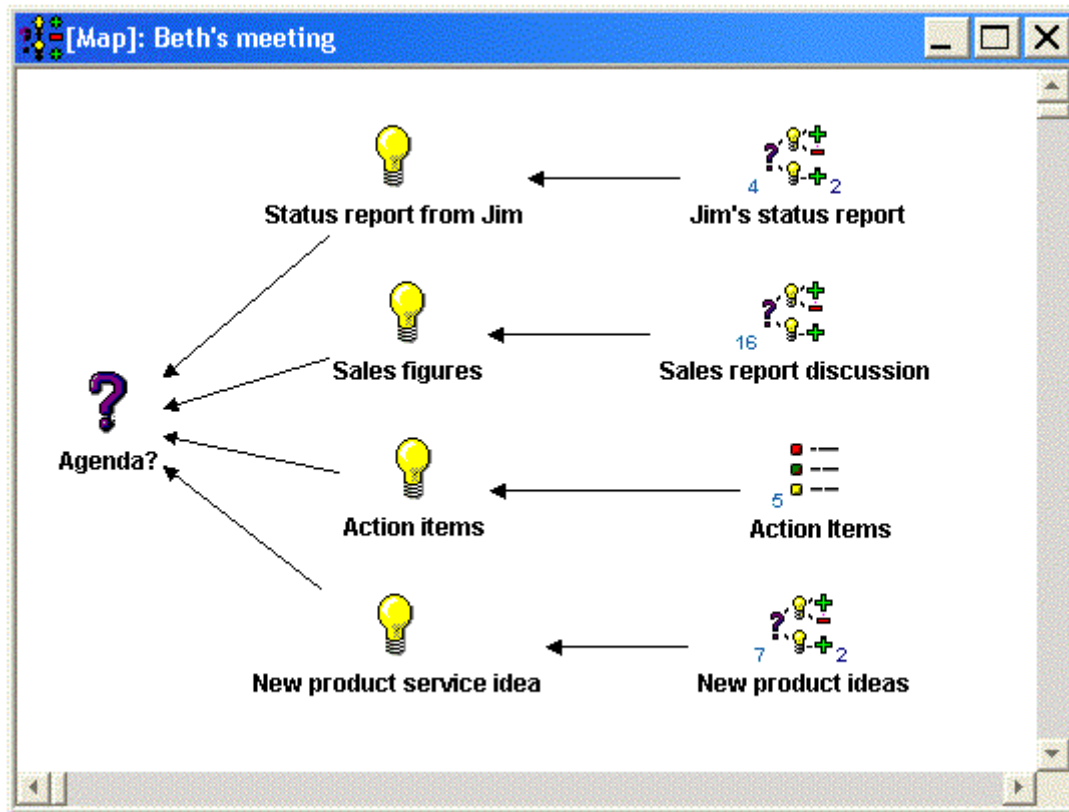

Figure 11: Final snapshot of meeting overview map

"Thanks," you say. "I think you really helped us here today. And I've sure got my work cut out for me!" Standing up and collecting your things, you notice you never touched your mail.

Three important points about this example. First, this scenario is simple so that it can be understood without a lot of technical background or hard thinking. It would be a mistake to conclude that Dialogue Mapping is only for simple problems. Maps can get very large and complex, with hundreds of nodes in a map and many levels of maps nested in other maps. The process and software has been used on some very large projects.

I used Dialogue Mapping with a cross functional group of 25 people at a large California electric utility to develop an environmental "scorecard" system for the corporation. There were four plenary meetings, spaced about a month apart, and dozens of small group meetings. All meetings were mapped, and the structure of the scorecard was mapped as well. By the end of the process there were dozens of maps, many with upwards of 100 nodes and links in them. In another example, Bell Atlantic used the system for their Y2K contingency planning. A cross functional

team of eight met several times a week for a four month period leading up to January 1, 2000. All meetings were mapped. They constructed a system of 100's of maps based on a limited palate of templates. Many of the maps are very large and include both qualitative and quantitative data about their systems.

Second, this story illustrates an attitude, a "way of being", that Jamie holds as the Dialogue Mapper in the story, an attitude that is critical to the success of Dialogue Mapping. First, Jamie is not a passive scribe; he is not trying to run along behind the participants and transcribe their conversation. He isn't quiet – he talks and even interrupts sometimes. He is an active – you might even say passionate – presence in the room.

Third, what Jamie is passionate about is listening. He's passionate about making sure that each person has been actively and accurately heard. He doesn't have any agenda or stake in the content of the meeting – his only agenda is helping the group build an accurate map of their conversation.