CAST and the Visual Story Map

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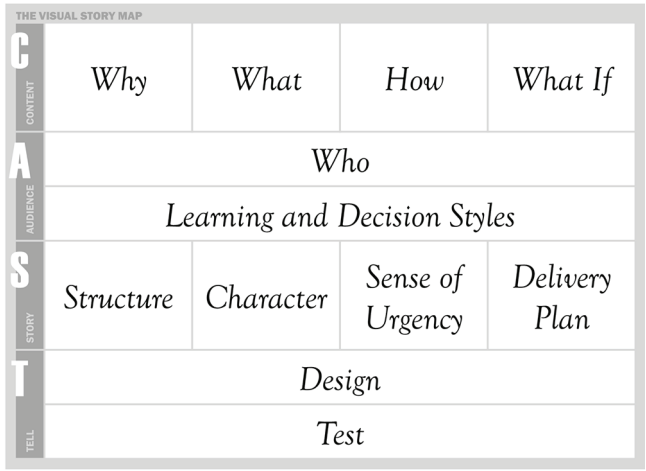
I keep six honest serving-men
(They taught me all I knew);
Their names are What and Where and When
And How and Why and Who.
—Rudyard Kipling, Nobel Prize-winning novelist famous for his short stories.

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

The Visual Story Map

The diagram below is called a *Visual Story Map*. We developed the Visual Story Map to illustrate the process for creating a visual story, and to show how the steps of the process relate to one another. We named the process *CAST* after the four main steps shown vertically on the far-left side of the Visual Story Map: *C*ontent, *A*udience, *S*tory, and *T*ell.



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

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

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

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

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

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

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

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

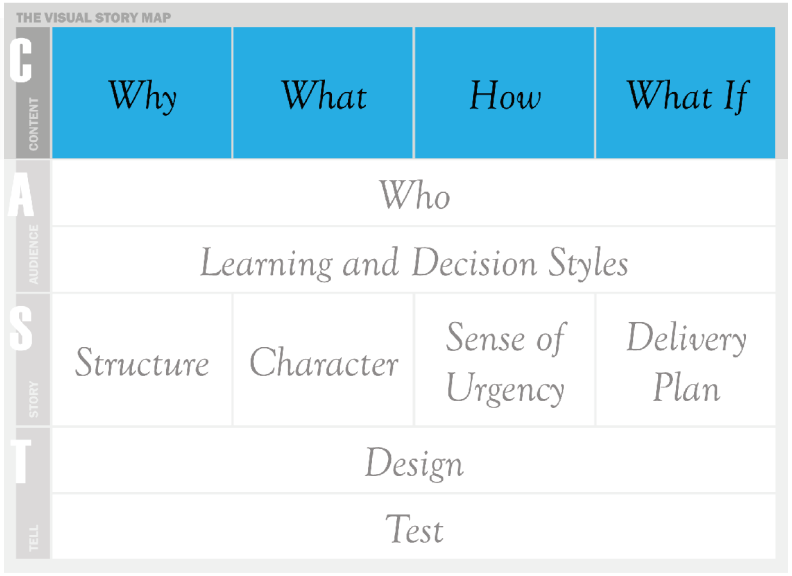
My ideas became compelling, and then to my surprise, easy to remember. Some of my visual stories started to "go viral," as I presented a story to one person and he or she used it to present those same ideas to others.

Good CONTENT Makes For Good Stories

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

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

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



WHY People do not like to change, and where possible most people will avoid making decisions. Your story has to give them a clear reason to act. We find that the best way to be clear, and remain clear, is to make the reasons for change as explicit as possible. This includes identifying any external influences that your audience should react to, as well as the personal goals of your audience that can be tied to your story.

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

HOW Wave your hands, say a few words, and everything is different. *This approach only works for Harry Potter.* In most situations decisions take time to implement, and the process of change requires careful planning. Good stories include a lot of action, where something happens, and the content you identify now will form a large part of the visual story. You may be starting something new, stopping something, changing an existing activity, and possibly ensuring that some things remain the same while everything else changes around them. An important step we will cover in the "How" chapter is to show the clear linkage back to "What" has to be changed, and "Why." Linking your plan to the reasons why the story is important to your audience allows you to convince everyone that you understand their concerns.

WHAT IF There are always alternatives, the competing ideas and reasons why your audience might not be as supportive of your idea as you want them to be. You'll need to explain why this change should be supported, even when there are so many other needs and demands. Why should other worthy causes get a lower priority? Why this direction and not another? Through the development of the Content row, we will help you to place your change into the broader context so that you can convince your audience to follow you now, and not wait until a later day that never comes.

The Content row is based on questions or the common interrogatives of "Why," "What," "How," and "What If." While these interrogatives are often used by journalists, they are also used as a structure for the analysis of business problems and for the different ways in which people learn.

During the last decade, many organizations have had great results with a structured approach called the Benefits Dependency Network, developed at the Cranfield University Business School Centre for IS Research. This approach helps organizations understand the benefits of business change programs. We simplified and adapted this approach to create techniques to structure the content for a visual story, and also incorporated ideas from current research on how people learn and make decisions to help focus on what the audience needs to understand.

The "Why," "What," and "How" cells build a logical sequence with strong connectivity that helps underscore the reasoning and motivation in the story. Many stories fail because there are unbelievable leaps for the characters, or actions that seem to have no justification. The work in this row of the Visual Story Map helps your audience understand why they need to change, what to change, and how to change it. When you build this into a visual story you will provide a convincing sequence of activities. The "What If" cell looks at the challenges, consequences, and alternatives. The information gathered here can put a twist in the story that can help make it stick in the minds of the audience

Our understanding of factors that influence the *stickiness* of ideas comes from the book, *Made to Stick,* by Chip and Dan Heath, which is based on work they've been doing over many years. In their book, the Heath brothers describe how to make an idea stick: make it simple, unexpected, concrete, credible, emotional, and tell the idea as a story.

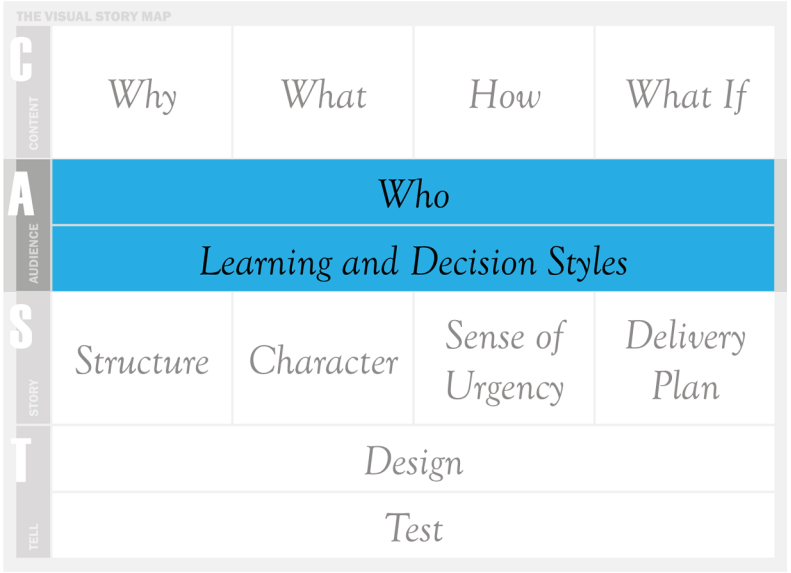
Why did we go to all this effort? Because we believe that applying the most current science will help you to create the most compelling story. We made it easy by taking the research and turning it into a step-by-step process for you to follow.

Motivate Your AUDIENCE to Act

Understanding your audience is key to selecting the right story structure, formats, and deciding how to represent your content to lead them effectively to a decision to act. The Audience row, covered in Chapters 8 and 9, consists of two elements, Who, and Learning and Decision Styles.

WHO To convince an audience, you first must figure out who they are. If you know who will be in your audience, you can build an understanding of their interests, their support for your ideas, how much they know about what you want them to do, and how they individually might influence each other. In some cases you may have never met your audience; all you know of them are broad characterizations. For these situations we will look at the use of personas to help develop a focus on the motivations that drive the group.

LEARNING AND DECISION STYLES The way you present your content, from the selection of formats to the order in which you present it to the different members of the audience, should be determined by an understanding of how the audience will react to what you give them. Some people will expect details, others will want to know how your proposal will impact the people in the organization. This section uses research on the different learning and decision styles to help you focus your story in a way that produces the results you need, without missing any cues.



As you will discover in learning the CAST process, we believe that you will need to be ruthless in throwing out extraneous details. Deciding what to keep and what to discard can be tough. The best place to start, we have found, comes from carefully considering the people you want to influence and building the story specifically for them. What motivates them? How do they learn? What kind of information do they require in order to make a decision?

If you want your story to be successful make sure it addresses the important question that is rarely voiced:

"What's in it for me?"

Our methods for audience analysis are built on the best practices from three very different professions: project managers who use stakeholder management techniques, salespeople with their influence maps and methods to convince people to buy into a dream, and professional change managers who understand the process people go through as they adopt change. Martin had a realization, many years ago, that visual stories need to be created with the same insights into the audience that top salespeople use when creating their sales pitches.

When you use a story to make change happen, you're often asking your audience to perform two different and difficult tasks. You are asking them to *learn*, and you are asking them to *decide*. The learning and decision styles that cut across all aspects of the Audience row are drawn from the techniques used by psychologists, sociologists, salespeople, and educators. A technique that has been particularly successful for us is based on research from the 1970s by Bernice McCarthy into how children learn, work that has been developed into techniques now used by educators around the world. It is simple to implement and can be used quickly to act as both a filter and guiding structure to take the content in the top row of the Visual Story Map and ensure that it fits with the range of learning and decision styles of the audience.

Asking a person to learn is different from asking a person to decide.

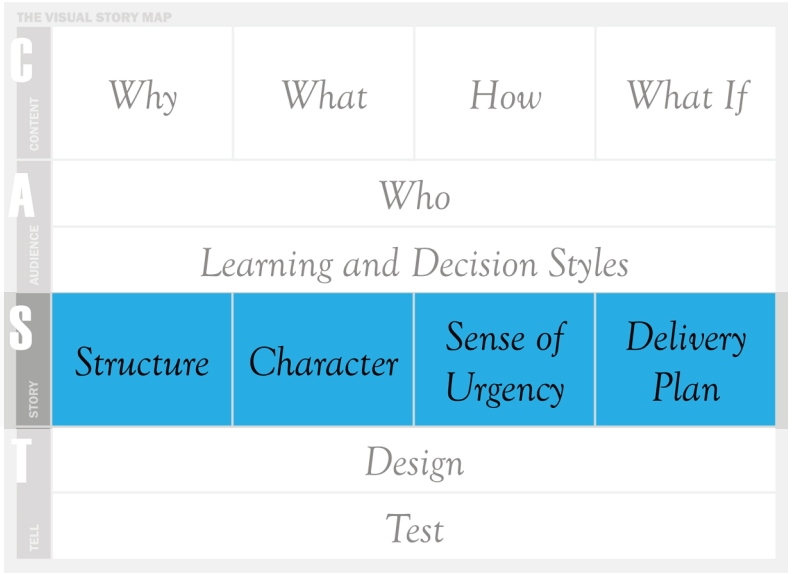
I was leading a number of projects to implement new IT solutions into our business. Most of the potential solutions came from some of the biggest companies in the IT industry and we were trying to pick the best combination based on our business needs and the capabilities of the software. We thought we had a good plan, but we had competitors with different plans. Those competitors were not limited to internal people with alternative ideas. They included external salespeople from the big IT companies who were trying to sell us their solutions, regardless of the fit with the other suppliers or our internal capabilities.

The approach of the sales representatives from the big companies was much more influential with our senior managers than our approach was. Each time we met with our senior managers, we found that the external sales teams had already been to see them and set the stage for their next discussions. They had a better story and a better approach for delivering it, and this was based on understanding our executives better than we did! We finally got a solution to fit our needs, but only because we managed to get a vote on the procurement board for the project.

The salespeople were just doing their job, and doing it well. Based on this experience, I concluded that we needed to find out how salespeople sell an idea and then build that approach into the process for creating stories about change.

Give Your Audience a STORY to Remember

The Story row of the Visual Story Map guides you through the process of building an effective, interesting, and compelling story. There are four elements in this row, Structure, Character, Sense of Urgency, and Delivery Plan.



STRUCTURE Stories have a beginning, middle, and an end. They take the audience on a journey, and they use idioms, metaphors, rhetoric, and archetypal plotlines to help the audience connect with your ideas. Picking the right format and structure of a story helps to make it memorable and relevant.

CHARACTER Your audience has to care in order to become truly engaged. Characters are critically important for humanizing your message and allowing members of your audience to see themselves, and their success, as being connected with the struggle of the characters in the story. The characters in your story must be meaningful to the audience, but that doesn't mean they all need to be people. In Chapter 11 we look at how to create characters for people, inanimate objects, and concepts — in short, anything that must change.

SENSE OF URGENCY There are many types of stories, but they all have one thing in common: the characters are placed in a situation where they must react. The sense of urgency in your story will help you to focus on the story elements that drive your characters, and your audience, toward the conclusion you want them to reach. Is there a conflict to resolve, a puzzle to solve, or an obstacle to overcome? We build on lessons learned from top salespeople to capture urgency, to make your story compelling, and cause your audience to choose to act now.

DELIVERY PLAN We are accustomed to stories being told in many different ways. Sometimes a story belongs at a team meeting, shared with peers, sometimes in a boardroom, and other times in a company cafeteria. Even business stories could be presented as movies or told around a campfire at an offsite retreat. In this part of the CAST process we cover the many different ways you can tell your story, and why having a range of channels can multiply the effectiveness of your message.

In Chapters 10 through 13 we cover the Story row, drawing on multiple sources to provide the structure and scope for the visual story. Our mix of sources starts with Aristotle and spans centuries to include the work of world-famous scriptwriting lecturer, Robert McKee; draws on the seven basic plots of stories identified by Christopher Booker; and the narrative and character structure identified by Vladimir Propp over a century ago. It's a diverse mix intended to provide inspiration and ideas rather than prescriptive rules.

Story, by Robert McKee, is a book for script writers, for the people whose stories we see every day on stage, in films, and on TV. There's a large body of evidence about what makes a great film or a memorable TV show. What McKee points out, quite forcefully in his lectures and training courses, is that no magic formula always wins. We draw on McKee's experience to create the overall story structures and advice about how and when to use them.

From Propp's work and an analysis of common plots, we provide a set of archetypal characters that can help to clarify and define the potential characters in a visual story. In many cases, you know the story will have a hero and a villain and someone who will set the hero on his or her way, but with different plots, the hero can become a villain and vice versa.

Visual stories are not created for entertainment. Visual stories are meant to cause someone to make a decision and to take action. For that to happen, you often need to elicit a sense of urgency. A sense of urgency is often a core concept in sales training, where the salesperson's intent is to entice the consumer to buy today rather than wait until tomorrow to make a decision.

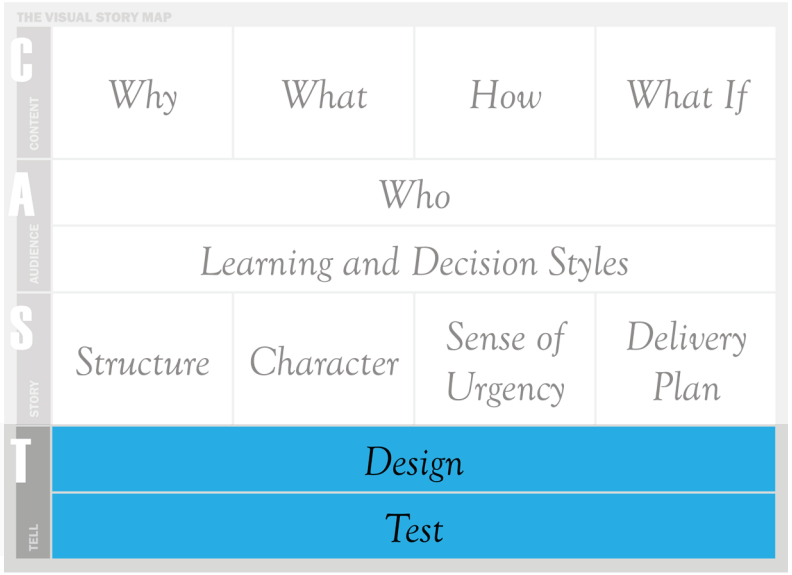
As Martin described in his story about competing with external sales teams, you may have competitors (both external and internal) who are trying to sell their ideas, and the audience is going to make a choice. The key lesson is *not* to ignore their sales tactics, but rather to use them to your advantage. We built the CAST process to leverage the techniques that salespeople use to sell an idea. That way, your presentation can be as compelling as your competition, and thus as successful.

Drive your audience toward the conclusion you want them to reach.

Visual Stories Are Designed and Tested for Someone to TELL

Finally, it's time to pull the parts together to tell the story itself. We cover the Tell row in Chapters 14 and 15, where we look at how to create visual elements for the story, characters, and supporting content, combine those elements in compelling ways, construct a rich one-page picture of the story, and validate that your story can be told and understood in a variety of formats.

Chapter 14 examines *design*, and Chapter 15 shows you how to *test* your story.



Design is a critical component to influence your audience.

DESIGN Whether through the words you say, the words that are written, or the visuals you use, it is the mental image you create that helps to influence your audience. Design is a critical part an effective influencing process. Even a thoughtful, creative, data-rich, and potentially successful story can fall flat on its face if the most convincing visual elements and approaches for your story are not identified and chosen carefully. For example, if you present two different options, one in red text and the other in green text, your visual may be sending a message to some of your audience about what to go ahead with and what to stop, but others who are color-blind may just not get the message.

TEST Did you cover all your bases? Did you include all the information you need in order to make your story compelling? Did you stay away from using too much red? (Just kidding.) Did you practice the "telling" of your story and refine the visual story to both support your telling and the path to a decision? In short, how do you know your visual story is good enough to influence your audience? There are no guarantees, but we know there are common problems that derail stories, and lead to confused audiences. In this last part of the CAST process we bring together a set of six tests that will reduce your risk of failure.

With the CAST process, you now have real clarity on the content and the justification for every element you include. We call this focus *intentional design.* Every part of the visual story is focused on getting to the core message; you don't spend time creating content that you later realize is not relevant, or distracting.

Design is a skill that you continue to develop over a lifetime of practice. However, time after time, we've seen how using just a few of the right techniques can quickly make a fantastic impact on the quality of the result. The surprise to many people is that you get all the way to the fourth row before you start to create the visuals.

When Mark agreed to be a co-author it made a massive difference to our ability to write the book and also to the advice we could provide on design techniques. Mark took the lead writing the design chapter (Chapter 14) to cover techniques for ideation, composition, and content coding to support the development of your story in formats from one-page posters to animations. Truly, seeing is believing. The design section includes guidance drawn from graphics designers and experts in the analysis of visual design, including Edward Tufte, who identifies many of the secrets to effective data visualization in his classic book, *Beautiful Evidence*.

Finally, we looked at the visual stories we have created and a wide range of examples we have seen over the last ten years to identify six tests that, while not a guarantee of success, at least help you to quickly spot the common problems. Testing your visual story includes the necessary steps to ensure you have included, and excluded, all the right things, and also includes examining the potential unintended consequences of your recommendations.

Testing is more than just rehearsal. A communication technique called "Active Listening" encourages the person listening to feed back to the speaker what they are hearing, by paraphrasing or re-wording what they have heard in their own terms. In this way the meaning of the conversation is actively confirmed by both parties. We think of testing as a similar active process, where you will ask your test audience to feed back to you what they heard in the story, how it made them feel, and what they would do as a result of hearing and seeing your visual story.

The CAST acronym for the process, and the current format for the Visual Story Map, happened one day by looking at the grouping of notes on a page. Until this point the process had been represented by the image of a machine taking in the inputs for the story, with levers and controls to select the story and character combinations.

Today we use the Visual Story Map to capture key notes for a visual story, and as a reminder of the key elements that must be considered. We'll look at how you can use the Visual Story Map in the next chapter.