

Evolution of a StoryMap



Field Notes to Sketches to Visual Model

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Evolution of a StoryMap

The CSFB Thought Leader Forum is an annual conference designed to bring together leading thinkers and practitioners from a variety of disciplines to challenge the traditional mental models of investing. Sente Corporation illustrates each of the presentations at this conference and builds a comprehensive record of the conference. For an example, see:

www.senteco.com/thoughtleader2002

For the 2003 Thought Leader Forum, Sente created a StoryMap to serve as an overview of the conference and of the speakers. Based on the presentation titles and speaker biographies, we mapped the different speakers onto a “landscape” of ideas.

Purpose of This Presentation

The purpose of this presentation is to describe our process for developing this StoryMap. We have written this specifically for people who have participated in our Visual Modeling Workshop, but the process may also be of interest to visual practitioners and part-time doodlers everywhere. If you have any questions or comments about this process, or are interested in a StoryMap of your own, please contact us at smethurst@senteco.com or 407.622.2144.

Overview of the Process

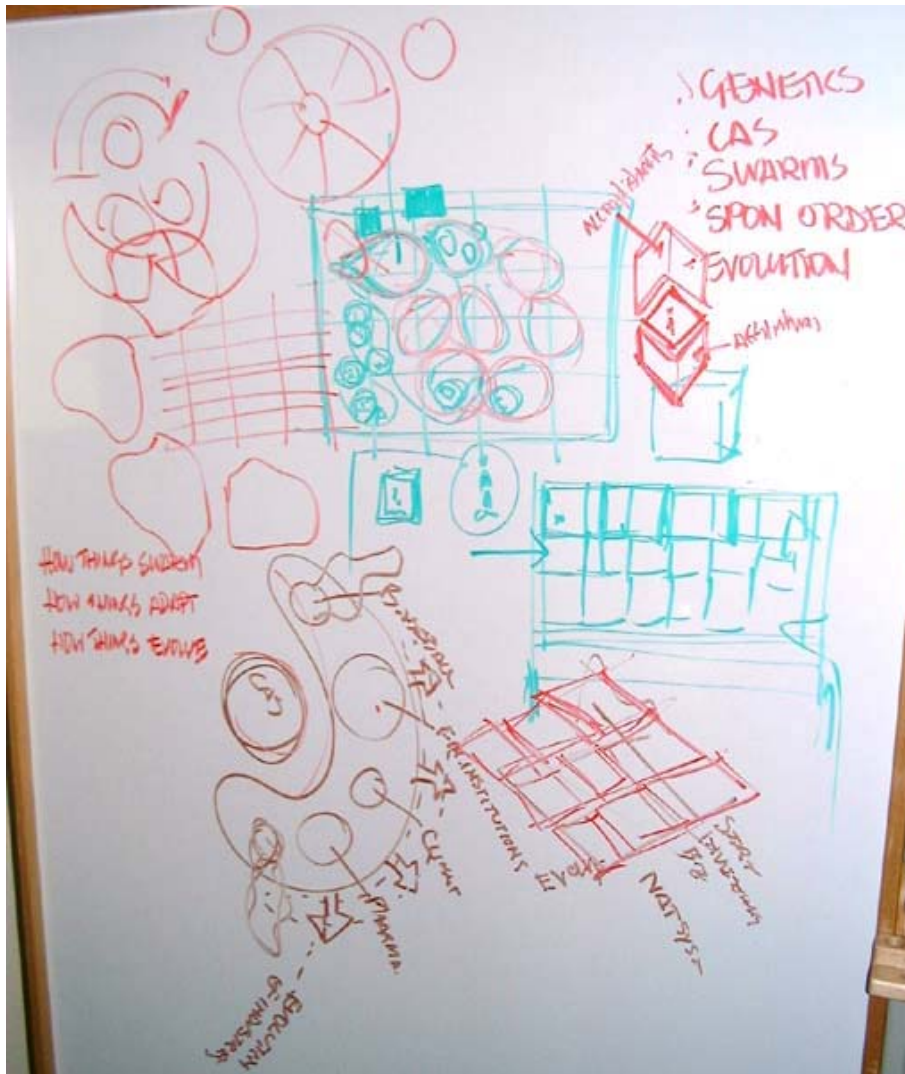
The general process that we use in the development of a StoryMap is Field Notes – Sketches – Visual Model. We begin by sorting through our “raw materials” (in this case the speakers’ biographies) and taking notes on the interesting ideas that we come across. Next we begin to develop sketches of possible relationships between the actors and of possible organizing principles for the StoryMap. Once we have developed a fairly robust sketch, we shift media and create the final Visual Model.

In this example, all of the field notes and sketches were created on dry-erase marker boards. The final StoryMap was created using Macromedia Freehand and a Wacom Graphics Tablet.



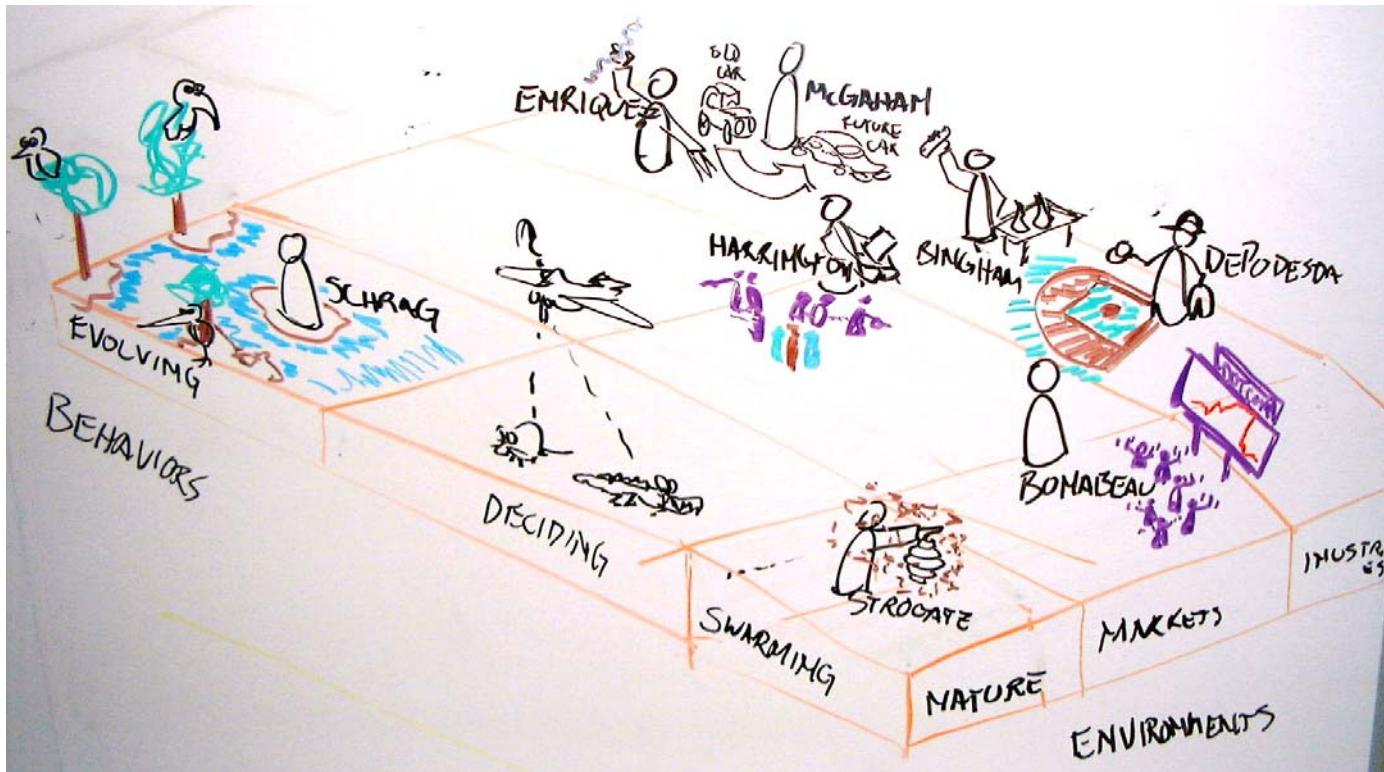
Field Notes

The field notes for this StoryMap were based on the conference agenda and the short biographies of the speakers. The notes took the form of a mind map. Each speaker is given a circle. Inside the circle is the speaker’s “area of interest”, e.g. baseball or pharmaceutical R&D. Outside the circle, we wrote the title of the presentation. Other pieces of content or areas of interest are linked to the circle. We tried to place similar areas of interest near each other, but discovered that we had missed some connections. The red lines represent the connections that we were able to draw once all of the speakers were on the wall, e.g. “evolution” or “CAS” (Complex Adaptive Systems). This map gave us a preliminary understanding of the scope of content that we had to work with.



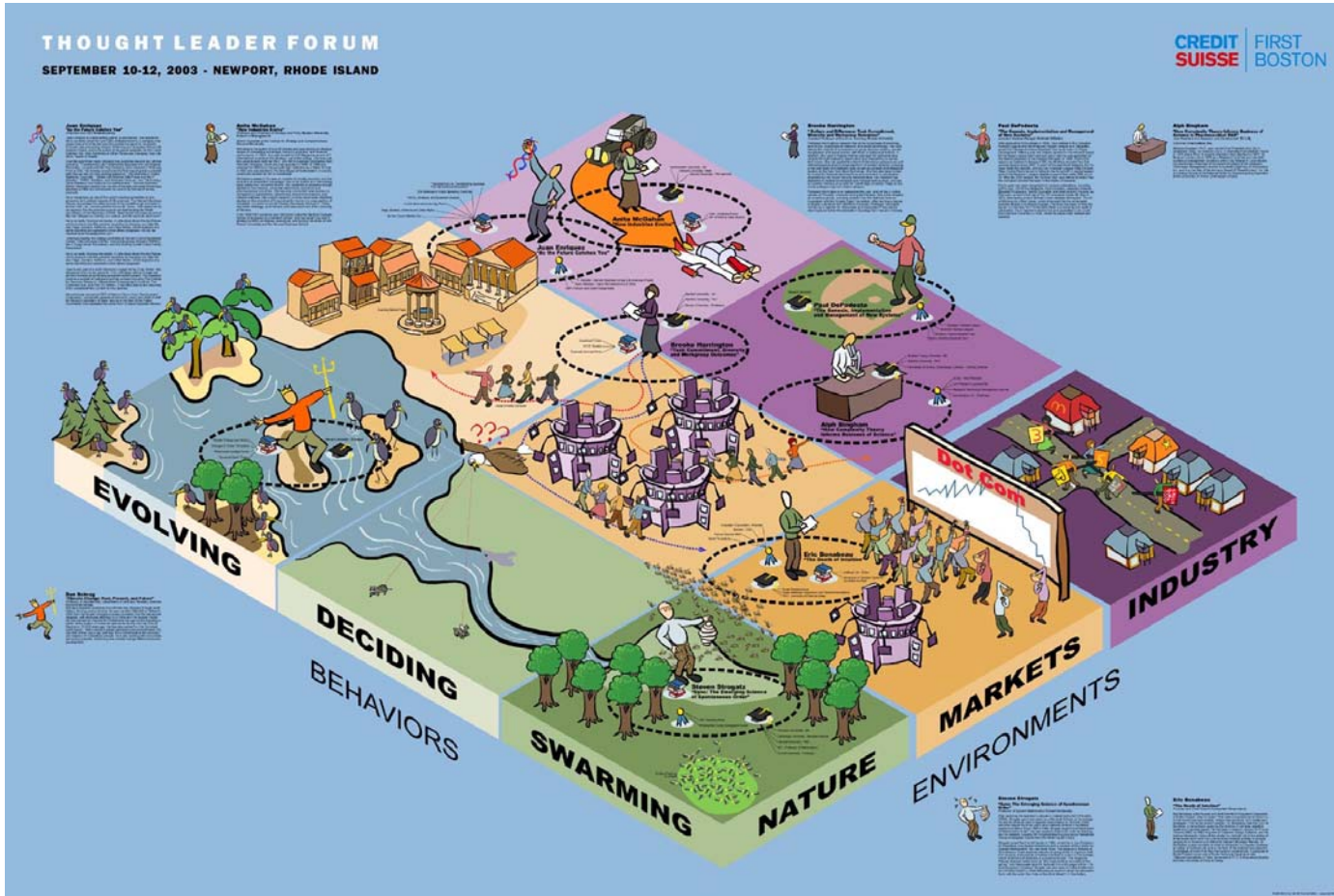
Preliminary Sketches

Once the field notes were complete, we began to search for an organizing principle. These sketches represent several different approaches that we tried for organizing this information. We identified a small set of common themes from the speakers – evolving, adapting, swarming and deciding. We also identified a number of different environments in which these behaviors can take place. This led us to create the matrix that you see in the lower-right corner of the board. The organizing principle of our StoryMap became a 3X3 matrix, viewed on an isometric plane. (So instead of looking straight at the matrix, we have laid it out like a landscape.)



Advanced Sketch

Now that we have found our organizing principle, it's time to figure out what the StoryMap will really look like. The matrix cross-references three different behaviors (Evolving, Deciding and Swarming) with three different environments (Nature, Markets and Industries). Our first task was to place the speakers onto the grid. Based on their biographies and titles of their presentations, which of these areas will they address? Dan Schrag talks about climate change – that's pretty clearly about Evolving in Nature. Paul DePodesta will be talking about building a great baseball team on a shoestring budget – that sounds like how to make decisions in a particular industry (baseball). Brooke Harrington was a bit more complex to pin down, and ended up touching Evolving and Deciding in both Markets and Industries. Each speaker's location on the map indicates how they relate to the other speakers.



Visual Model

For the final illustration, we change media from marker board to computer graphics program. (We use Macromedia Freehand and a graphics tablet.) The StoryMap is 4' X6' and will be displayed throughout the conference. The illustration gives attendees a “lay of the land” for how the speakers relate to each other conceptually. The StoryMap also includes the full speaker biographies. (These are printed in a small font to encourage people to engage more closely with the illustration.)

The visual metaphor that we chose for each cell depended on the environment, behavior and speaker. Schrag, for example, talks about climate and oceanic evolution, so he is represented with a triton (like Neptune) standing in a Galapagos-like set of islands on which each of the species of birds and trees have evolved differently.