Storyboarding

Introduction

Storyboarding is a structured process, which enables a small team of participants to explore a topic and arrive at a consensus view on a course of action or a set of conclusions. The process uses pin boards and cards as the principal means of collecting, sorting and editing ideas.

A typical storyboarding session lasts three to four hours and involves two phases:
- A Brainstorming Phase, and,
- An Editing Phase

These phases separate creative thinking from critical thinking.

Team Composition

Best results are achieved with teams of 5 to 12 people. It is difficult to run a successful storyboarding session with more than 12 people, because of the time it takes to air all opinions and achieve consensus. It is useful to involve a cross section of people involved with the problem or issue under discussion, together with one or two people who are total outsiders, and may possibly add a fresh view to the issue.

Facilitator

A facilitator conducts storyboarding. The role of the facilitator during the brainstorming phase is to:
- Prompt the team to think broadly about the subject and,
- Remind the team of the rules of brainstorming and storyboarding.

During the Editing phase the facilitator ensures that:
- Each idea coming from the brainstorming phase is addressed and discussed,
- The team is kept on the task,
- All views are heard and,
- The ideas retained on the storyboard accurately reflect the feelings of the group.

Resources

Storyboarding requires:
- One or more pin boards
- Felt tipped marker pens
- Push pins
- Small, medium and large sized system cards
- Butcher's paper
- Adhesive tape

The pin boards are covered with butcher's paper so that at the end of the storyboard

session the cards can be stuck down with tape and the outcomes rolled up for typing.

Room Set Up

Participants are seated at tables set up in a horseshoe or "U" shape facing the pin boards. Participants should be close enough to the pinboards that they can easily read cards when pinned to the boards.

Setting the Objective and Purpose of the Storyboard Session

It is important that the objective and purpose of the storyboard are clearly understood by all participants at the start of the session. In highly exploratory storyboards the facilitator commences the session by leading a discussion with the group to establish the Objective and Purpose of the storyboard. The Objective is the outcome sought at the end of the session (e.g. "A clear definition of job roles in relation to new product development.") The Purpose is the underlying reason for the objective (e.g. "To speed the process of developing new products and reduce unnecessary duplication of activity and waste.") Where the Objective and Purpose have already been defined, for example by Senior Management, these are presented and explained by the facilitator to the team.

Brainstorming Phase

In the brainstorming phase, the facilitator asks the team to generate as many ideas as possible in relation to the topic. Participants write one idea per card. Ideas are called out as they are written. This enables participants to build on each other's ideas. Ideas are written with felt tipped pens in large writing so they can be read easily by all participants. As ideas are written they are pushed forward to the facilitator who pins them to the board. From time to time during the process, participants are encouraged to review the ideas on the board as a means of triggering further ideas.

During the brainstorming phase no criticism or discussion of ideas is allowed as this would disrupt the flow of ideas. The facilitator prompts participants to think of the topic from as many different angles as possible. Wild ideas are encouraged. The more ideas the better. The Brainstorming phase ends when the team have exhausted their ideas.

Editing Phase

In the Editing phase, the cards are grouped on the board into logical groupings for discussion. Headings are written on larger cards for each grouping. Cards are pinned in columns under the relevant headings as shown in the following diagram. It is important that all cards are visible and that no cards overlap. This ensures that every idea is considered and that cards can be readily moved or discarded without disturbing other cards.

Heading
Card
Card
Card
Card
Card
Card

Each heading is taken in turn. The cards are discussed and if necessary modified to better explain the ideas. An important rule in this phase is that the cards now belong to the team, not to any one individual. The aim is to achieve consensus. That means that every participant must agree with the opinion or idea expressed in the card if it is to stay on the board. There should be no voting or majority rule approach. As long as there is one dissenter the discussion must continue. Additional cards may be written to amplify ideas. These are indented in the column to show that they are subheadings under a previous card. The facilitator helps the team compose cards that more accurately reflect their views. Where the team rejects ideas they are taken off the storyboard. Finally the cards in the column are arranged in a logical order so that they form a flow statement or story.

When all columns have been discussed and edited in this fashion, the storyboard is complete. Tape is used to stick the cards down. Pins are removed and the storyboard is rolled up.

Reporting

After the session, the results can be typed as a report of the session. If the editing phase has been carried out satisfactorily, it should be possible to type up the storyboard verbatim, with no further editing.

Variation 1 - The Affinity Process

There are two options for grouping cards prior to discussion and editing. Where the team has generated around forty cards or less in the brainstorming phase, the cards may be grouped by discussion, led by the facilitator. For this purpose it is useful to have a second pin board, so that cards can be taken from one board and grouped on the second board.

When a large number of cards have been generated in the brainstorming phase, the

Affinity Process may be used to perform an initial grouping of cards. A typical affinity process takes around fifteen minutes. The facilitator removes the cards from the board and spreads them out in random fashion on a suitable table. The team gathers around the table. Each person works individually. No talking is permitted during the process. This ensures that no person dominates the team. Participants familiarise themselves with the cards then commence grouping related ideas. The facilitator encourages the team to ensure that groupings are clearly defined and that no cards are obscured or removed from the table during the process. The facilitator impresses upon the team the importance of being entirely satisfied with the groupings. Participants are encouraged to rearrange other's groupings if they see fit. When the team indicates that they are entirely satisfied with the groupings, a heading card is written for each grouping. Groupings are then transferred one at a time back to the board for discussion and editing, as described earlier.

Variation 2 - Limited Cards

In some circumstances the facilitator may choose to limit the number of cards that each participant is allowed to generate during the brainstorming phase. This is useful when a quick poll of issues is required, in order to select issues of importance to storyboard in greater detail.

Variation 3 - Signaling Priorities

At the completion of a storyboard it can be useful to have the participants rank the issues discussed in order of importance. For this purpose each participant is given five adhesive spots. (These are available from most stationers.) Participants are able to "spend" these tokens as they see fit, to indicate what they see as the important issues. Participants simply walk to the board and stick their tokens against the cards that they personally see as the most important issues. They can put one token against five cards, or all five against one card, or any combination as they see fit. The outcomes are reviewed and discussed to establish the overall view of the team as to where the priorities lie.