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Podcast Transcription

Implementing Lean Marketing Systems



## Shared Understanding thru Dialogue Mapping

Guest was KC Burgess Yakemovic

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## **Transcription of Interview**

**Joe:** *Welcome everyone! This is Joe Dager, the host of the Business901 Podcast. With me today is KC Burgess Yakemovic. She has over 25 years of experience capturing and using decision-making rationale within both the corporate and small business environment. She is the Director of Training at the CogNexus Group, a firm that specializes in training the process of Dialogue Mapping.*

**Joe:** *I guess I'll start out with a basic question and have you explain what Dialogue Mapping is.*

**KC:** Well, if we look at this from say a 50,000 foot view, Dialogue Mapping is a form of facilitation of a group discussion. The facilitator is skilled in using both the IBIS method and a tool; we currently use Compendium Software for mapping the conversation and making that map visible to the participants of the conversation. It is a form of facilitation that works best when you're dealing with a complex, complicated problem. The purpose of having the map is to make the content of the conversation visible to the participants. Now if you think about a normal conversation, bits of the conversation get lost especially when you're dealing with a complicated discussion. So what you see on the Compendium screen can function like

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a huge desktop where everything is on top and in front.

**Joe:** *One of the things that jumps out at me from just the explanation of it KC is that when you think of a session, most people steer away from trying to map during the dialogue because they think it's limiting. They go to this post-it notes type of arrangement and other things, but you're saying it's not limiting but it might create better dialogue?*

**KC:** Yes, it certainly can in the hands of skilled facilitators. A client recently used this approach for a brainstorming session which is not the sort of normal use for Dialogue Mapping or using IBIS and Compendium, but he happened to have a session that was primarily about brainstorming. After the session as part of the assignment he was doing, he was consulting with the participants and they noted that there was a great deal of freedom that came from using Compendium and IBIS because there were no limits on proposing what kind of answers that might be given to the questions. When they normally worked with post-it notes, they found themselves limiting themselves to maybe a couple of answers each person because they didn't want too many post-it notes on the wall. It was going to be too hard to sort through things, and they didn't feel that they had that problem when they were just putting it on the screen.

**Joe:** *When you're actually putting in on the screen, is there a certain process that is, I think in the book it alludes to let's say a listening cycle, is there a certain process you go through while posting on the screen itself?*

**KC:** The foundation of Dialogue Mapping is IBIS. The IBIS method is based on questions to

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which people propose possible answers that are called ideas and then they can talk about the pros and cons of each of these ideas in the context of the question. So within that structure, the dimensions you can go to are infinite. There are no limitations in terms of the topic of the conversation, how many possible answers you might want to propose, how many pros and cons you might want to give for any particular answer.

**Joe:** *You talk a lot about facilitation. What role does the facilitator play? Is it the normal facilitation role or are they more active in the conversation using Dialogue Mapping? Can you explain that role?*

**KC:** The facilitator in a Dialogue Mapping session has a couple of major functions. One is to help the group identify the questions that they really need to answer to understand the space of the problem they're dealing with. The other role, that the facilitator plays is structuring the free flowing conversation that occurs into the IBIS structure of question, idea, pro and con. And neither one of those skills are the normal skills of a facilitator. The question one maybe a little bit closer to normal, but learning to think in IBIS and automatically translate from a free-form conversation into this organized form is one of the major skills that needs to be learned.

**Joe:** *So it seems like a pretty powerful tool. Does the facilitator run the risk of steering the conversation?*

**KC:** Well, I suppose it's possible. The reason it's not as prevalent as you might think is because anybody, who's been trained in the method, realizes that in the role of facilitator,

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what your goal is to help the group identify the questions that's associated with their topic. You're not looking at the answers. You're not trying to help them get to an answer. So if any steering occurs, it's helping the group open up areas for discussion, not having them come to a predetermined conclusion.

**Joe:** *Is there times that someone will correct the facilitator and say, "Hey, let's not go there. Let's not go in the wrong direction here..." Does that happen?*

**KC:** It can happen, particularly if the topic of conversation is one that has a lot of let's say political overtones. It depends on the situation, what you do with that. A lot of this will be worked out in a conversation between whomever it is that is bringing in the facilitator and the facilitator in advance, setting up the ground rules, what is going to be allowed and not allowed, and things like that. Identifying areas that we're not just going there, it can be useful as well because it helps the group bond what their discussion is going to be like. You get different results from it working in a business environment than you would say working with a community group or some other non-governmental organization or things like this where you really do want to capture all of the different perspectives. In a business setting, sometimes there are situations where people say that just is not allowed as a topic of conversation. Okay, we won't go there.

**Joe:** *With Dialogue Mapping, I mean with putting it up on the screen, it seems like it's a good tool to be able to use virtually. Is it?*

**KC:** Yes. I have done a large number of sessions online. In fact, I would say most of my

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facilitation occurs during online sessions. I use web conferencing tools like GoToMeeting to share the Compendium screen, so everyone can see what I see and what I'm doing. I have worked with groups of 15 or more people scattered around the globe who are meeting to discuss a complex topic and it works very, very well particularly in these kind of virtual meetings where a lot of times people will go off and do other things while they're meeting. Because you have the screen in front of you with the conversation, and so even if they do decide to, "Well, I'll just quickly check my email..." They can come back and kind of catch up. So it works very well in a virtual session.

**Joe:** *I think it would more engaging. It makes you more part of the conversation, doesn't it?*

**KC:** Yes. Most people find it really useful to see what they've said on the screen. In fact, one of the big benefits of doing this kind of thing is that instead of people having to repeat things over and over because they're not sure people are hearing them, once it's captured, it's captured. If someone brings the same thing up again, you can point at the place in the map and say, "Does this represent what you said? If it does, we've got it. If it doesn't, we can expand it or add additional material and things like that." It can actually help make a meeting move more smoothly than a non-dialogue mapped meeting.

**Joe:** *To me it seems that the facilitator has to be pretty skilled to be able to do this. Because he's not necessarily an expert in the subject matter, he's an expert about Dialogue Mapping, correct?*

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**KC:** Yes and there are some skills that people need to learn to do this and do this well. You need to learn to be able to think in the IBIS method, and it's not hard but it's different than what most people do in their day to day thinking. Learning to do it and practicing it to the point where it becomes comfortable, it's kind of like riding a bicycle. There's nothing really difficult about riding a bicycle but until you get out there and actually do it, you can read all the books you want to about it, you're not going to be able to do it without doing it and practicing it.

**Joe:** *What is the IBIS method? Could you explain that in a little more detail?*

**KC:** Its a method, that Horst Rittel developed back in the 1970's to help capture conversations about a class of problems he called 'wicked problems.' They were things like city planning where there's just no one right way. And when you get into these kinds of problems, you can get far-ranging discussion, and in order to organize the content of that discussion, he came up with this method. The method is organized around questions. That's the root piece of IBIS that's the issue, in Issue-Based Information System is questions. To those questions, there are one or more possible answers which are called 'ideas.' Each of these ideas may have multiple pros and cons associated with that answer in the context of the question, and that very simply is what IBIS is about.

**Joe:** *It sounds like a great sales tool actually if you start thinking this way.*

**KC:** Well, one of the things we found is that learning to think in IBIS actually improves people's analytical or critical thinking. So even if you don't go all the way to Dialogue

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Mapping, there's a lot of benefit that can be realized just by using the IBIS method yourself with a tool like Compendium that makes it simple to organize IBIS components.

**Joe:** *Can I do Dialogue Mapping without being trained in critical and analytical thinking?*

**KC:** The short answer is probably no, because Dialogue Mapping is based on IBIS, this language that's used for capturing. So without learning IBIS, you can't do Dialogue Mapping. Once you learn IBIS, you'll find that your critical and analytical is improved whether you want it to or not. So that's the reason we offer the course in IBIS first. It helps people that aren't really sure if they want to do this Dialogue Mapping thing. Because if they find that this particular form of organized thinking isn't for them, they're not stuck having paid for a lot of training that they won't enjoy.

**Joe:** *I read the book, and I'll have to admit, I've read it several times. I got a couple programs, and I've downloaded the software and tried to do Dialogue Mapping within the conversations and I've struggled a little bit and it's just not easy just to start.*

**KC:** No, I think that really the best way, to get started, is do training with us. Part of it is that the book was written during the early of Jeff Conklin's exploration of Dialogue Mapping and since that time, we've learned a lot about how people learn to do Dialogue Mapping. If you try to learn to do it from Jeff's book, it's kind of like learning to swim by being thrown into the ocean off of a ship. It works but only for a limited number of people. So to find a way to increase the number of people who actually learn to swim, we designed a series of short, self-paced online courses. Each one is focused on a small set of skills that are needed



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to build up to the ability to do Dialogue Mapping.

First, you learn to use the IBIS method, then you use the Compendium tool, then you work on getting to a higher level of competency with each of these, so that finally when you add the facilitation component in the last course, you have a strong foundation for doing Dialogue Mapping.

The other thing about our courses is that we have assignments that allow you to apply whatever it is you're learning to the work you're doing on a day to day basis. And again, one of these things it gives you is the opportunity to say, "Hey, I've learned as much as I want to about this. I can use this. I've gained some skills, but I can see that this is not going to be something I'm going to be completely comfortable with, so I can get out at this point."

**Joe:** *One of the things that challenges me when I'm looking at it is that I'm not sure let's say how often I would use it or what's the limitations to Dialogue Mapping. Is it easier to explain when to use it or is it easier to explain when you don't use it?*

**KC:** You know that's a good question. There are aspects of Dialogue Mapping and again, this is one of the benefits of having this sort of the step-by-step process to get up to the point of doing Dialogue Mapping. Because formal Dialogue Mapping used in its entirety, the places where the benefits exceed the work, that goes into it, are fairly limited. If you're a professional facilitator, you may use it a lot more frequently. If you're working in a business environment, there are aspects of Dialogue Mapping such as the capture of information during a meeting that can be used without being the person doing the facilitation and those

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skills can be used very, very frequently.

I have some corporate clients who have trained a number of their staff members just to the level of doing the capture and not to actually doing the facilitation piece. They train a limited number of people to do facilitation because they're not just going to have a large number of meetings where the benefit of the facilitation aspect is sufficient. One of the places that it does come into play very nicely is anytime you're doing strategic planning, where you have a number of different positions, people have different things they are trying to accomplish and you want to get all of that information out and make sure that the plan that you're proposing covers as wide a variety of things as possible; complex, complicated things. I've used this method in the software design area a lot to deal with problems that keep recurring. You'll be doing a piece of design, you think you've got an answer to how this is going to work, you get out and get started on it and discover, wait that breaks something else over here. And now you go and try to fix that problem and wait now that broke something else.

There was one situation that we actually wrote up in a paper that it turned out there were six interconnected questions that all had to be answered simultaneously to develop a solution that would really work. We would not have noticed this if we had not been capturing our information in an IBIS structure and realized these questions kept not getting -- the answers to the questions kept shifting. We took those six questions, put them out in a room at the same time with all of the people involved in the design and when we saw all of these questions together and the answers we proposed, we realized that we didn't have the right solution, but we were then able to clearly define a solution that solved all six problems simultaneously.

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**Joe:** Well you know what popped when you were saying that to me is it sounds like a structured mind map to me that I can go in and out very quickly on to the subject and dig deep, but then I can bounce back and look at it from a broad perspective.

**KC:** Yes. We have had people who've come to our training from a Mind Mapping background and in a way, you can think of it as a very specific form of Mind Mapping with a specific structure, the IBIS structure around it. There are people who use Mind Mapping software rather than Compendium, and they've built the kind of structured notes that you need to represent the components of IBIS. So in that sense yes, it is a form -- it can be a form of Mind Mapping if your background comes from that to start with.

**Joe:** You don't see thrilled about that. What would be some of the problems thinking that way?

**KC:** Well, the issue is that one of the big benefits of Mind Mapping is the freedom and flexibility. I like to talk about the structure of IBIS as being like roads on a map or roads in the world. They don't limit you from getting from here to there, but they make sure that there's not just chaos in the process of getting from here to there. So, yes it's a structure but it's a very, very open structure.

**Joe:** It's a connected structure would you say?

**KC:** What I mean by open structure is you can build anything with it. I have not yet found

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anything that I couldn't capture in the structure of IBIS. But certainly are people who if you give them any kind of -- well, there's some sort of organization principle here, they'll find that to be too constricting. And that's often the case I find with people who come at it from a Mind Mapping background; they're invested in their previous learning and it can sometimes be a struggle to give that up for yes, there is some structure, and there's a benefit to having the structure in this IBIS language.

**Joe:** *I think that's very interesting as to how you phrase that because there does seem to be a path to get the best results. If you follow this structure, we're going to be able to make a deep dive and get the answers.*

**KC:** Well, what it does is it gives you a space to investigate to as deep a level as the group wants to. Any of the aspects of a particular problem, you know if you're working with a say a customer service problem that has just defied solution, getting all of the aspects out and it can be particularly helpful to involve people that haven't been maybe necessarily wrapped up in trying to solve that problem who'll give it a slightly different perspective. But you can get all the aspects out and all of them as I said on top and in front, which is a hard thing to do in if you're just like say using email to try to discuss something, or passing documents back and forth. Inevitably people decide, well we'll just ignore this little piece or whatever because it's just too hard to keep all of that information in mind, and I think that's the big benefit of the map.

**Joe:** *Oh it sounds like, and the mapping of it has to be a great challenge.*

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**KC:** You know it's interesting, I've been doing this long enough that I basically just do it. I know I'm past the point of thinking about it and I get amused because people ask me, well how can you, let's say listen to 15 people on a web conference all speaking with a variety of different accents and get what they're saying. And it's like well, that's the 25 years of experience. Because I worked in international projects starting very early in my career and you just get an ear for hearing what it is people are trying to say that it doesn't come in three minutes, but it's a lot of fun.

**Joe:** *When I go to my first facilitation and granted I'm not going to be very proficient and hopefully I do it in a smaller group before I do it with a larger group so I would only look foolish to a small group, but I mean does it really take three, four months? Does it take 15, 20 sessions to become proficient and I'd feel comfortable to exposing myself to the world maybe?*

**KC:** It very much depends on the individual. We have had people who took to it like a duck to water, and we've had people that have struggled with learning it. One of the benefits of our current approach to training is that you don't go into your first session without the skills you need to be competent. One of the things that needs to be learned is how to capture IBIS structured information at real time, at the speed of people talking. And so there is a course, the fifth one in this series that focuses specifically on capturing meeting content and you use it, you're not letting people see your screen yet so you can mess up, and no one notices, but you learn to get the skill of capturing at real time before you try to capture at real time and

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facilitate.

I think by using a step-by-step process, we've solved some of the problems people have had in getting to the point of being competent before they walk into their first meeting. And yes, in the sixth course where you start learning the facilitation skills, your assignments are things that step you through more complex situations. You don't start with one that's -- we're going to solve the problem of this company that has been keeping us from making our numbers for the last three years. You're going to start with much more simple, structured meetings where you don't have as much free form content and work your way into facilitating more open types of meetings.

For the people that are interested in actually becoming licensed or certified dialogue mappers, there is a process after the training that's a sort of apprentice/mentoring process which involves doing 30 hours of Dialogue Mapping and that includes your time for preparing for the meeting, as well as post-processing, the meeting. But what working with a trained person to understand what happened in a meeting, what are things that you know -- because in any individual situation, things will come up that we can't necessarily predict in the training and so being able to talk to somebody about, "Well okay this happened, I handled it this way. Are there any other things I could have done?" And working through that process really gets you to the point of being a fully competent dialogue mapper.

**Joe:** *And the first way, to start, is really just start taking notes that way.*

**KC:** Yes, learning to capture -- our training starts with using IBIS to work with your own

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thoughts. So before you even try to listen to other people, learn to think this way. Learn to take your own thoughts and shape them as questions, ideas, pros and cons. Once you're comfortable doing it with yourself, then you can move on to doing it with other people's thoughts. We start with printed material, because you can take as much time as you need to, to analyze the thoughts. And then work into recorded material which okay, now you have to do it a little bit more at real time but you can stop the recording and go, "Okay, wait a minute. I think that it should be that way..." And then you move into doing live meetings, where you're taking notes at meetings but you're not letting people see what you're doing. And then you move into putting what you're doing on the screen and letting people see what you're doing, and then finally you move into the facilitation piece.

**Joe:** *Do I have to be a good typist to do this?*

**KC:** Well, it certainly helps but no. Jeff Conklin is not a good or fast typist. Another one of our students, Paul Culmsee, he's in Australia, prides himself on not being a particularly fast typist. I find that that works best if you're a very charismatic individual and your way of facilitating is such that people are willing to give you some extra time to get down what they've said. I don't have that issue; I've been typing for many, many, many, many years at a high speed. So from my standpoint, I think being able to type is certainly going to help but there's no, "Well, I'm not really fast at this so I shouldn't do it at all..."

**Joe:** *I have one final question for you. The thing, that you brought up, is that we're sitting there, I'm dealing with a lot of let's say Six Sigma type, logical, very linear type thinkers and*

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*then on the other end on this Podcast, there's the service design, the design thinkers, the little less linear, to say the least, okay? Who's better at Dialogue Mapping or does it make a difference?*

**KC:** Who's better? You know, anybody, who's willing to work within the very, very simple structure of IBIS, is fine. So, we get both kinds. I think the people I found that just really took to it and had no issues with it at all were people who came out of a software programming background because they would look at it and go, okay this is just a language for capturing conversation. And because they were used to translating say customer requirements into code, it was just another translation for them. So that's kind of the fastest end, but we've had all kinds of people who have picked it up and enjoyed it and liked it and are doing just fine with it.

**Joe:** *Well tell me, what is the best way for someone to learn more and to contact you and maybe when they get there, what will they find there?*

**KC:** Well, if you go to the CogNexus Group Website, which is [Cognexusgroup.com](http://Cognexusgroup.com), you will find information under the 'Training' heading about the training that we do. There's contact information; you can send a contact request through that Website. And if somebody wants to reach me directly, I'm [KC@Cognexusgroup.com](mailto:KC@Cognexusgroup.com).

**Joe:** *Is there any events you have coming up or anything else you would like to mention?*

**KC:** One of the benefits of the training that we give is that it's entirely self-paced, so you



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start when you want to start. You move at a speed that you want to move at. We will pretty much be able to meet whatever response time you need in terms of getting assignments and review them back to you. And I just invite people to take a look and certainly send me an email if you have any questions after looking at the Website.

**Joe:** *So this is certainly a training program where I have interaction and feedback back and forth; I'm just not signing up for a bunch of videos, right?*

**KC:** No, no. The video piece of it is actually the small part. Most of the learning occurs in applying the concepts to work in your environment. And I like to point out for the corporate customers that we are under non-disclosure but if you have specific non-disclosure forms you want us to fill out, please send them; we are happy to do that. Because we really do want you to apply it to the work that you do day to day to get the benefits from it, but also to not be spending time doing stuff that's not work you need to do anyway.

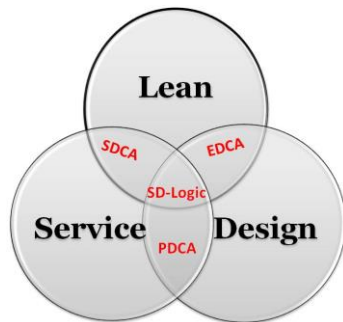
**Joe:** *Well, I would like to thank you very much KC. I appreciate it. This Podcast will be available on the Business901 Website and the Business901 iTunes store. Thank you very much KC.*

**KC:** *Thank you.*

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Joe Dager is President of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

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