

SO YOU WANT TO BE A GRAPHIC RECORDER?

Frequently Asked Questions and Answers

By: Christina L. Merkley, MA



A few times a month I get a call or an email from someone who is very interested in the Graphic Recording / Graphic Facilitation Field ... who wants to know how I got into the field and any advice I might offer them to do the same.

This article is written as a response for those kinds of inquiries. For people who are primarily interested in being full-time, self-employed Graphic Recorders or Facilitators. I've taken the general questions that people ask me and have written my responses.

Obviously my answers are only one person's point of view --- so I invite you to continue to ask questions and gather data as you explore this unique work.

Q. WHAT IS GRAPHIC RECORDING? GRAPHIC FACILITATION?

Before we can have an intelligent conversation about how to get into the field, we need to define which part of the field you are most interested in getting into.

Graphic Recording:

Are you interested in a Graphic Recording role? Graphic Recorders are scribes who listen, synthesize and transcribe information that is generated in different kinds of group settings (meetings, conferences, retreats, dialogue groups, circles, world café settings, etc).

Graphic recorders may work on their own when they are providing straight recording services (like creating summaries of the key points of speakers at a large conference), or they may pair up with facilitators, consultants and other kinds of leaders to use their skills as part of a team providing graphic facilitation services (mostly in strategic planning and visioning kinds of settings).

Graphic Facilitation:

The Graphic Facilitator role is more complex. The Graphic Facilitator is responsible for providing both recording services and facilitation services; weaving the two together at the same time. They may do both these roles themselves. Or, they may pair with a Graphic Recorder, and between the two (or more) of them, they provide Graphic Facilitation services for the client.

Q. WHAT SKILLS ARE NEEDED?

Graphic Recording:

Graphic Recorders need excellent listening and synthesizing skills. They need to be able to quickly understand and follow information (that they may not be familiar with) and sort through it to determine importance, priority, relevance, etc. Then, they need to have visual/graphic/art/formatting skills to be able to translate the importance, priority and relevance that they have heard into attractive, engaging notes that others can easily comprehend.

Given the public nature of this work (while some work is done in studio or pre-prepared ahead of time, most is done live in front of people in real-time), Graphic Recorders also need to be calm, centered and grounded individuals, able to work under sometimes stressful circumstances with many different kinds of people in many kinds of settings.

“What constitutes a good graphic recorder is the ability not only to depict visually and instantly what is going on, but to bring a quality of listening to the process that is sensitively attuned to the emotions, feelings and dynamics going on in the room. You have to care about everything that everyone says, to really get people’s points and represent them. When people collectively put ideas up on a board the focus automatically shifts from me to we”.

Susan Kelly (Graphic Recorder) as quoted in Commongood Magazine, Sept. ‘96

Graphic Recorders also need to be independent (yet also able to work inter-dependently), organized and reliable. Be able to contract their role, responsibilities and fees clearly. Be able to navigate themselves to meeting sites (that may be local, regional, or international locations). And have the general basic business and marketing skills that any self-employed professional needs to run a successful and profitable business.

It also helps to have some basic computer design and digital photography expertise. In order to work virtually with other team members and to provide post-meeting documentation services (reports, reproductions, coordination with other design and printing vendors, etc).

Graphic Facilitation:

A Graphic Facilitator needs to have the above graphic recording skills (or the ability to partner with a good recorder), as well as all of the regular facilitation skills that a typical facilitator requires to successfully create and lead a group gathering, event or meeting process (agenda design, contracting skills, group process and facilitation techniques, handling conflict, planning/visioning expertise, etc).

A good site for basic information about facilitation is [The International Association of Facilitators \(IAF\)](#).

Q. WHAT ARE THE TYPICAL VENUES YOU WORK IN?

Graphic Recording/Facilitation is performed in many different venues, below are some of the most common. The industries and environments are just as varied: corporate, governmental, and not-for-profit. Almost anyplace where people need to come together to think, hash out ideas, and make decisions.

- Planning and Visioning Retreats
- Leadership Retreats
- Scenario Planning Meetings
- Change Management Projects
- Large Group Conferences / Summits
- Keynote Addresses / Special Presentations
- Focus Groups
- Open Space
- Brainstorming Sessions
- Dialogue Sessions
- World Café Forums and Clarity Circles



Photo courtesy of Ken Weitzel

“The processes that can be mapped out are not limited to but include brainstorming, strategic planning, conflict resolution and mediation, teaching, presenting ideas, project planning, career and transition planning and counseling ... in personal and professional life, any time people are gathered together to discuss options, ideas, strategies, potential conflicts, history or future – it’s a good time to get out the paper and start mapping.”

Millie Sonneman, author of Hands on Graphics



Photo Courtesy of Lynn Carruthers

Q. WHAT IS THE INCOME LIKE?

Obviously, many different factors impact your income potential from this type of work (where you are, your experience and skill level, whether you are willing to travel or not, how much you want to work, what kinds of clients you work with, how tapped into a network/market you are, etc.).

Good, seasoned Graphic Recorders (for top corporate work) typically earn in the \$1200-2000 per day range ... less for not-for-profit work.

Graphic Facilitators typically earn in the \$1500-3500+ per day range for corporate work.

Obviously your potential annual income is VERY dependent on experience, network, amount of days worked and types of clients. It can take years to build to a healthy and sustainable income base (depending on what you are starting with and where you are).

I have built a practice in one location and moved it to another country. In both instances it took approximately three years to build to a full-time sustainable, mature income. And, obviously, there are good years and not-so-good years.

Q. WHAT KIND OF BACKGROUND DO YOU NEED?

I have heard many varied stories about how people got into this kind of work. Some had formal art backgrounds and some did not. Some had MBAs or other kinds of business training, and some did not. Some were facilitators, consultants and other kinds of leaders and added graphics onto an already robust toolkit. Some learned along side mentors and took organized skills training, and some just jumped in and experimented and created their own unique livelihoods. Basically, where there is a will (and passion!) there is a way.

Q. WHAT WAS YOUR PATH? HOW DID YOU GET INTO THIS WORK?

I came through the academic route. I discovered the field while I was completing a Masters in Organizational Development and Transformation in San Francisco in 1995 (a fellow student showed me some graphic recordings and I was instantly intrigued).

While I had an artistic knack I did not have any formal art training. I ended up doing an internship with [The Grove Consultants International](#) (pioneering graphic facilitation firm ... one of the few organized companies in this field ... the creators of the recordings that my friend had shown me) I was introduced to "The Grove" just when they were creating a product line around their Strategic Visioning Process. I incorporated this process into my master's thesis (which I did back in Canada) and eventually was hired by Grove in an administrative capacity.

My big break came one Friday afternoon when my mentor at the time (Diana Arsenian), said she wasn't doing a graphic recording job the following Monday, I was! That event in '96 kicked off my official 'graphics' career. Since that time I've logged over 600+ meetings, have traveled extensively throughout North America (and Europe), launched my own practice (Make Your Mark Graphic Facilitation) and have relocated myself from San Francisco back home to Victoria, British Columbia.

Currently I facilitate visioning and planning forums, teach, train and mentor others in the graphic methods and focus on my passion area: using the graphics in coaching and personal development arenas with individuals and small groups (see [The SHIFT-IT Graphic Coaching Process](#)).

Q. WHAT DO YOU ENJOY MOST ABOUT THIS FIELD?

I most enjoy the variety and change. Meeting lots of people in lots of different 'worlds'. Learning. Hearing different experts talk and think. Seeing how different people deal with similar factors (the economy, trends, environmental factors, speedy pace of our world, technology, etc). Appreciating people working through 'group process' and figuring things out, at least for the time being. The ability to travel. The income and independence that this work gives me. The fun of teaching others.

Q. WHAT ARE THE DOWNSIDES?

Different people in this work feel different things about it downsides. Here are few things to consider when contemplating this career path:

- Depending on where you are located, you may need to travel quite a bit (this can really impact your home life and it can be difficult to have a 'regular' schedule)
- Early on (and sometimes later) you will have to constantly figure out ways to market and get yourself known and 'keep your funnel full'
- Starting out fresh, it can take several years to build your practice up so you are self-sustaining and it can be challenging to take other supplemental work and still keep your schedule open for recording / facilitation work
- Early on (and sometimes later) you will have to win skeptics over who think its all just pretty pictures
- Until you have clients who work with you on a regular basis, it can be tiring to go through the same ramp up and education process with each client
- You get ink marks on your best clothes that the dry cleaner's can't get out!

Q. HOW DO YOU FIND WORK?

I find my work (or it finds me) through various channels. I have a strong network of fellow 'visual practitioners' who refer work to me and visa versa. I have an educational website and e-zine, that I add to and update regularly. I am a member of my field's association ([The International Forum of Visual Practitioners](#): IFVP). I write articles (like this one) that sometimes get circulated and picked up by others. I volunteer my work for causes that I care about (i.e. The Kidney Foundation). I do demos and talks at local universities and colleges and help out local Leadership and MBA students. I host workshops. And most of all, I work. Work begets more work. People see this methodology and 'get it' ... it is a very experiential medium ... you need to experience it to really understand its effectiveness, practicality and charm.

Q. HOW DO YOU SUGGEST I BEGIN?

Training, mentoring and volunteering are the steps that I recommend most to people.

If you are a facilitator already, and want to add graphics to your toolkit, find a Graphic Facilitator in your area (or travel to one) who can provide you with training, mentoring or coaching on the basic skills. Like myself, many of my colleagues offer basic training and/or are willing to create custom training for you based on your direct needs ... the same goes for people interested in the Graphic Recorder role. The Grove Consultants also has regular workshop offerings.

Read my article, [22 Tips for Practicing Your Graphic Recording / Graphic Facilitation Skills](#) for ways to practice at home and in low risk situations.

Create a formal mentor relationship with a seasoned Graphic Recorder or Graphic Facilitator (depending on which side of the field you want to work). Set up sessions with them to be taught or coached on specific things. Be willing to pay for their time (most professionals will be willing to negotiate a lower fee for you than their regular day rate, if you can demonstrate you are really serious about the field and about wanting to learn). Volunteer your time to 'shadow' them on assignments. There may be some situations and clients that it is ok for them to bring you along on to observe and help out where you can (set-up, takedown, basic list recording, etc).

Volunteer for no-pay or low-fee work to develop your basis skills. Offer your services to groups, associations, churches, charities, etc. You can begin charging and raising your fees as your confidence and skill set grows.

Q. RESOURCES?

Below are some of my most recommended resources:

Association for Visual Practitioners

www.ifvp.org

The association for the graphic recording/facilitation community. Host's annual conference bringing together eclectic group of practitioners who use spontaneous visuals and graphics in their group work: consultants, facilitators, recorders, cartoonists, and other artists. Excellent way to meet people in the field (rare opportunity as most of us are solo practitioners and rarely have a chance to come together as a group) --- conference is designed for both seasoned folks and 'newbies'. Very friendly. Site has information on the conference as well as regional directory to find practitioners in your area and other assorted resources.

ALPHACHIMP / BLOG ON GRAPHICS RELATED FIELD

<http://graphicfacilitation.blogs.com/pages/>

Peter's Durant's packed, eclectic blog filled with all sorts of graphic-related paraphernalia. Articles, inserts, quirky information ... all in one central location and updated regularly from different contributors.

GROVE CONSULTANTS INTERNATIONAL

www.grove.com

I worked for The Grove in San Francisco from 1996 to early 2001. They are the pioneers for working visually with groups. David Sibbet is the founder. Excellent online store chock full of facilitation tools. Especially check out their Strategic Visioning Process. Excellent stuff!

Mindmapping – The Work of Tony Buzan

www.mind-map.com

Site for Mindmap® originator, Tony Buzan. Graphic overview technique with the 'freedom to roam the infinite expanses of your brain'. Buzan Brain Friendly processes.

Mindsapes

www.mindsapesbynancy.com

Non linear, systems-oriented, graphic note taking approach by Nancy Margulies.

FACILITATION AND OTHER GROUP METHODOLOGIES:

APPRECIATIVE INQUIRY

<http://appreciativeinquiry.cwru.edu/>

A portal for sharing academic resources and practical tools on the Appreciative Inquiry approach ("positive change").

GLOBAL BUSINESS NETWORK

www.gbn.com

GBN is a leader in the evolution and application of scenarios as a collaborative exploration of the future. Membership organization that provides training and consulting in developing strategy in uncertain futures. Uses graphic templates in their scenario process.

Harrison Owen, Open Space

www.openspaceworld.com

Open space is an organic process to create multi-workshop spontaneous events, with a focus on distributed leadership and self-managed working groups.

INTERACTION ASSOCIATES

www.interactionassociates.com

The outfit that put 'facilitation' on the map. Founded by Doyle & Strauss of "How to Make Meetings Work" fame.

The World Café

www.theworldcafe.com

Website on Café technology that holds the space for 'intentional conversation around questions that matter'. Juanita Brown and David Isaacs' creative process for leading collaborative dialogue.

Q. PARTING WORDS? ADVICE?

My parting words are 'go for it' and 'where there is a will there is a way'. If you have a pull to this field, find out more about it! It is rapidly growing, particularly as the Internet links us in new and creative ways. Yes, you will have to be quite independent in creating your livelihood solely around this work --- but most good things in life often take time to acquire and build --- so it is with developing graphic recording, facilitation and self-employment skills.

I wish you all the best in your journey of development!

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Christina Merkley, M.A. is a Graphic Facilitator, Coach and Mapmaker based in Victoria, British Columbia, Canada. An expert in the graphic recording and facilitation methodology, Christina uses visual methods to help groups and individuals SEE and ACT on their best thinking. See <http://www.makemark.com> for more articles, portfolios, and information on her Meeting Graphics 101 Workshop.

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