

# Playful Participation.

## How pen, provocation & a personal touch boost user engagement in workshops

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### Abstract

Based on a case from industry we describe the use of graphic facilitation to engage participants in workshops. With an outset in design sketching we describe and exemplify the use of graphic facilitation and reflect on its relevance for supporting a playful environment and the results on user participation in a professional learning situation.

Further, we provide guidelines for practitioners on how to efficiently use graphic facilitation in situations where engagement, learning and reflection are of the essence. The guidelines include using a personal style of sketching, making large numbers of sketches directly in front of the audience in real time, and contextualizing learning points in humorous ways.

### Keywords

Playful participation, user engagement, user involvement, graphic facilitation, visual rhetoric, knowledge-sharing, learning, provocation, sketching.

### Introduction

In businesses all over the world, professionals meet in order to learn, think and get inspired by others. We participate in meetings, workshops, classes and conferences like ever before, despite the fact that a booming industry dedicated to improving the return on meeting investment suggests that some of this time is perhaps not well spent.

Traditionally, Western culture has privileged the spoken word as the highest form of intellectual practice and seen visual representations as second-rate illustrations of ideas (for further discussions, see for example Mirzoeff 2002 and Foss 2004). However, research in communication and semiotics has shown how visualisations can add substantial communication value to spoken and written words (Mirzoeff, 2002). Kress expands how the semiotic modes of writing and of image are distinct in their *affordances* and describes the unique contribution of visuals:

“Image is founded on *the logic of display in space*; writing (and speech even more so) is founded on *the logic of succession in time*. Image is spatial and nonsequential; writing and speech are temporal and sequential. This is a profound difference and its consequences for representation and communication are now beginning to emerge in this semiotic revolution” (Kress 2000, p.339).

Semiotic revolution or not, the professional practices of using drawings to improve learning and communication in work contexts are booming. Numerous sub-genres exist in various fields of practise, including visual facilitation, sketchnoting, mind-mapping, graphic facilitation, graphic recording, scribing and rapid visualisation. Most of these would fit into the superior category *visual rhetoric*, a term used to describe communication that uses visual means to evoke emotions in the recipient in order to make an impression. It is beyond the scope of this paper to describe all the different sub-genres within visual rhetoric, but for an experience-based overview of key terms within specifically rapid visualisation, see (Nørgaard 2016).

In this paper we describe a case where sketches were used to improve the experience and learning outcomes of a series of workshops in the Danish construction industry. We discuss the case in order to explore how the use of sketches might be deployed to enhance playful participation in a professional learning context.

## Related work

### The relatedness of playfulness, humour and new thinking

Though *play* and *playfulness* are concepts naturally linked with childhood, adults are fully capable of playing and can benefit a lot from these activities (see for example Sutton-Smith, 1997; Brown, 2009; Bateson & Martin, 2013). Playfulness can be identified as a particular positive mood state which drives creativity and innovation, and helps people escape conventional thinking (Bateson & Martin, 2013, p.5).

In “Playing with Ideas” (2011), Patrick Power explores the term playfulness as an attitude in an adult context and maps its relationship to creativity. In the context of creative processes, Power relates the use of humour to the experience of playfulness: “We are all familiar with established patterns, with habitual, lazy, or cliched ways of perceiving, thinking, and feeling. Humor often relies on incongruity, on disrupting pattern and expectation (...) Through wit and humor, we can disrupt the basis by playfully switching perspectives, by collapsing categories, by creating fresh blends and unexpected connections, and by confounding expectations.” (Power, 2011, p. 308). A similar relation between humour and new thinking has been made by De Bono (De Bono 1972 and 1990). Maybe unknowingly, Power suggests a link from playful activities to visualisation practice, when describing how playful activities strengthen our emotional system by using *associations* and *metaphors* (Power, 2011). The ability to accociate rapidly is key when creating visualisations, and especially real time visualisations where the demand for fast ideas often result in extreme motifs and metaphors (see figure 1, and for more examples in English, see <http://mienoergaard.dk/2016/02/emec16/>).

(insert figure 1: Rapid sketches from a workshop on IT security and architecture. The sketch recontextualizes topics in relation to a stream flowing from the mountains, three-eyed fish being hauled from the water to suggest ‘surprising output’, for example.)

### Sketching practices in design

In the design community, sketching is often understood as the production of paper sketches of the type described by (Goldschmidt, 1991; Goldschmidt, 2003), but in fact, sketches can take many forms. Buxton (2007) uses the term sketch to describe any representation of an idea or concept that can be used to get new ideas, develop old ones, or think about well-known issues in a new

fashion. Consequently, a sketch can be pen on paper, a design artefact or physical performance of, say, an intended interaction design. In the literal as well as in the metaphorical sense, designers sketch to help themselves and others see things in new ways, including *physical forms* which can be sketched using 3D modelling or experiments with materials, *modes of interaction*, and the potential *use context* of a design, which can be sketched using enactment techniques such as forum theatre, (Newell et al., 2006) or bodystorming, (Oulasvirta et al., 2003).

No matter the material properties of the sketch, the act of sketching is a tool for aiding idea generation and exploration of ideas in a design situation. Accordingly, the activity of sketching facilitates reflection in action (Schön, 1983) because of the on-going dialogue between the sketch and the sketcher. In some cases this is also referred to as *backtalk* (Goldschmidt, 2003). The activity of creating sketches depends on a whole series of choices that spark the process of and attention to the framing and re-framing of a topic, as described by (Paton & Dorst, 2011). Apart from helping new thinking in terms of reflection in action and the framing of concepts, sketching is also practiced because it helps designers talk about and share an idea, as well as remember and store its key components (Ferguson, 1992; McGown & Green, 1998; Ullman, Wood, & Craig, 1990).

## Making other people think with provocation

Designers also make use of provocation to drive discussion and help colleagues and users see things new ways. In participatory design, for example, 'provotypes' are used as a provocative tool to challenge design assumptions made by designers and other stakeholders (Boer & Donovan, 2012). In critical design, provocation is used to force consumers to reflect on the values and challenges of living with digital technologies (Dunne, 2005; Dunne & Raby, 2013), or challenge the ideology inherent in a certain design, such as SignWave's Auto-Illustrator that imposes a non-precise input mode on the user of an application for digital drawing (Brynielsen, 2002). The extreme sketching technique described in (Nørgaard 2011) uses humour and extreme situations to document and provoke discussion, in order to help participants engage with challenges and to boost new thinking. The sketches' physicality, content and hand drawn nature makes them work well as tickets to talk (Sacks, 1992), because they seemingly lower participants' threshold for engaging in a discussion with strangers. The reason for this can be found in brain studies that show how the human brain is far more active when we watch someone draw live as opposed to when we look at a ready-made illustration. Related studies show how the human ability to make associations increase when we experience someone drawing live (Brown, 2009).

## Practice inspired by design sketching

While sketching is a well-established discipline in design and architecture, other industries have taken inspiration herefrom and build their own practices. One such practice is described by Sibbet as *graphic facilitation* (Sibbet 2001 and 2008). Graphic facilitation is inspired by the practice of designers and architects, and entails an interactive style of facilitating groups of people in thinking, reflecting and remembering using large-scale visuals (Sibbet, 2001). The practice has grown directly from a network of American consultants from companies like Interaction Associates and The Grove Consultants International Design have since the 1970's spread globally with as many variations as practitioners. In the following, we use the term graphic facilitation to identify the specific practice described in the case, and graphic facilitator to name the professional carrying out the activities. We use the term sketches to describe the physical manifestations of the practice.

In this paper, we explore how graphic facilitation can be used by a professional in front of an audience to help them experience some of the effects of design sketching described above.

Based on related work, we hypothesize that having a professional graphic facilitator demonstrate values such as 'be evocative', 'explore', 'produce fast', 'quantity over quality' which are inherent in - especially Buxton's understanding of - sketching, will affect the general atmosphere in a workshop and in consequence result in playful participants.

We also hypothesize that the use of provocation and humorous motifs supports playful participation helping participants talk about, share and remember the content of the workshop. This way we re-conceptualize the notion of sketching moving the discourse from design and architecture to education (Bernstein 1996) and consequently contributing to our understanding of how graphic facilitation might be used and evaluated.

## Case description

The examples discussed in this paper originate from a series of six full-day workshops for employees working for the large Danish contractor, Enemærke & Petersen a/s. The workshops aimed at teaching customer-centered service and conflict management. Participants were mostly construction workers from the company's many construction sites, such as plumbers, carpenters and painters, but also included administrative staff and management.

During the full-day workshops participants were required to get acquainted with theories about conflict psychology and conflict management, and reflect on what behaviours might influence customer experience and the social/professional interaction between different stakeholders in a large construction project. Finally, participants were intended to engage actively in the dialogue about company values and reflect upon which behaviour would demonstrate those values.

To boost the level of engagement and to help participants who -for most parts- were not used to sitting down listening for hours, we chose to supplement the traditional lecture-and-powerpoint communication with graphic facilitation.

We did this since we wanted to:

1. Help participants concentrate during lectures
2. Engage participants in reflection and dialogue
3. Support an energetic and relaxed atmosphere in order to get an honest and constructive dialogue with participants, and
4. Facilitate knowledge-sharing and memory.

In the discussion, we will return to these four goals.

The company paid a fee for the service in accordance with the market price for professional graphic facilitation at the time.

## The practical setup

Each workshop was set up in a large open space with about 50 participants seated in groups. The process included presentations from various teachers supplemented by group exercises aimed at supporting dialogue with the participants about key elements in the presented theory.

The wall behind the teachers was used to display powerpoints. Left and right was placed a two-sided mobile whiteboard each containing blank A1 paper posters to be used by the graphic facilitator.

## Process and technique

During each workshop the graphic facilitator would listen to teachers and audience from stage and interpret themes, examples, questions etc. in rapid sketches, providing a real time channel of visual input to the participants.

Emphasis was put on sketches with a -often provocative or humorous- motif showing context and actions, as described in (Nørgaard 2011). Speed and quantity was prioritized over details and finish (as advised in, for example, Buxton 2007) to keep the flow and to keep sketches open for interpretation. The sketches were produced in a continuous flow resulting in eight walls of sketches at the end of each workshop. To summarize key learning points, the graphic facilitator would present the sketches from stage in the last minutes of each workshop. The following day, participants were given digital copies of the sketches in order to boost their memory (for one example, see figure 2).

(insert figure 2: After each workshop the eight posters were digitized and organised side by side in a collection fitting A3 format. Participants would receive a copy the day following the workshop they attended.)

Before leaving the workshop, participants were asked to fill out a feedback form evaluating the relevance of content, the teaching style and participants' own contribution. The feedback was not analysed systematically, rather used as a guide for changes to be implemented in the following workshops.

Before and after each workshop a brief informal meeting with teachers and customer stakeholders aimed at making changes to practice in order to improve the return on investment. In these meetings we discussed possible changes in practice based on observations and participant feedback.

## Results

In the following, we will present observations made during the workshops. We will also present key insights from the meetings we had with the teachers and company stakeholders between and after the workshops. Later we will discuss these results in relation to playful participation.

### Observations made during workshops

During the six workshops, we experienced the participants observing the production of real time sketches closely. In breaks, about half of the participants made a detour on their way to pick up coffee, and stopped to study the sketches. As a rough estimation, half of the participants would spend about a total of 10 minutes studying the sketches during one workshop. Once in front of the sketches they would talk about some of the stories depicted and joke about certain motifs. Especially people who, during the teachers' presentations, had noticed their own comments being sketched seemed keen on taking a closer look. In several instances we observed how a spectator would call on a colleague in order to show him a specific sketch (see figure 3).

(insert figure 3: One participant advised that employees do 'more than what is expected of them' (the text in Danish). An argument which was deliberately misinterpreted by the graphic facilitator. In a break the participant would rush to the particular poster to study the sketch closely, and call on colleagues in order to share it.)

The teachers used the sketches ad hoc when referring to points previously made. When discussing a certain theoretical model, which was no longer visible in the powerpoint show behind

them, they would walk over to the sketches related to that model and point to or tap the sketch while asking a question to the participants. Teachers would also use the spatial distribution of the whiteboards across the stage to underline their words with a time consuming and physical gesture. For example, when referring to a topic presented in the beginning of the workshop, the teacher would walk about 10 metres from the centre of the stage to the very first whiteboard, as if walking back to a specific time of the day. From this position he would continue talking.

## The physical space is changing

The atmosphere of a physical space plays an important role in shaping the behaviour of the people inhabiting it. Designers put effort in building up dedicated design spaces filled with photos, material swatches, sketches etc. in order to form a creative space to inspire thinking, knowledge-sharing and engagement. As Buxton frames it: “A design studio without ample space to pin up sketches, reference photos, clippings and the like (...) is as likely to be successful as an empty danceclub” (Buxton, 2007, p.153). In other words, the physical space reflects the activities of imagination and explorative dialogue, and the visual representations on the walls document and encourage new thinking.

In this case, every workshop would start with a similar arrangement: large empty posters fill up the predominant area of the stage, suggesting to be placeholders for important information to come. After seven hours of workshop, the look and feel of the physical space have changed: The calm white surfaces have been substituted for a host of colourful sketches demonstrating a high level of activity during the workshop. As a result, there is a large quantity of inspiration in a format that invites the eye and brain to engage, meaning the graphic facilitator slowly has build up the equivalent of a design space on behalf of teachers and participants.

## Reflections on value from the customer workshops

As described above, we continuously discussed observations and participant feedback with teachers and company stakeholders in order to improve practice and return on investment. Feedback from company stakeholders and participants suggested that participants experienced that graphic facilitation supported their ability to concentrate during presentations. Seemingly, having something inspiring to rest their eyes on - which also happens to interpret the information coming through their ears - helped participants engage in the workshop topics mentally.

The collections of sketches distributed after each workshop was used by participants to share knowledge and support memory. Company stakeholders reported how participants would hang copies of the collections in the trailers at the company’s construction sites and how they would explain the content to visitors.

Inspired by the use of the sketches as a tool for knowledge-sharing and repetition, the company used selected motifs to illustrate a booklet on customer-centered service and conflict management, which summarized the content of the six workshops. These booklets were given to all employees (see figure 4). The company later reported how many employees brought the booklet home to share it with their families, inadvertently perhaps, repeating central learning points and theories to themselves.

(insert figure 4: Selected sketches were re-used in a booklet that repeated key learning points combining text and illustrative sketches.)

Finally, the company reported how they re-used individual sketches from the six workshops to support written communication to employees regarding customer-centered service and conflict management.

## Discussion

In the beginning of this paper we proposed to re-conceptualize the activity of *sketching* in order to boost playful participation in work settings. We hypothesized how having a professional graphic facilitator demonstrate sketching values would affect the workshop atmosphere, and inspire participants' playful participation. Further, we hypothesized that humour and provocation is related to playfulness and can serve to help participants talk about, share and remember workshop content.

In this section we will discuss the case presented above in order to explore how graphic facilitation might be deployed to enhance playful participation. We specifically focus on understanding which qualities of the product (the materials and content) and the practice (the actions) of graphic facilitation that support a playful atmosphere amongst participants. We organise the discussion around the four goals presented in the case description.

### Helping participants concentrate during lectures

Feedback from customer stakeholders and participants suggested participants used the graphic facilitation to help them concentrate on the teachers' presentation. Stakeholders reported how participants seemed to pay more attention to presentations than when attending workshops without graphic facilitation. Maybe because the high activity level on stage spurred curiosity, and captured the participants' attention with the gradual unfolding of visuals.

Participants described how graphic facilitation would help them direct their focus to the stage and support their listening better than static powerpoint slides. Seeing content being interpreted in sketches real time was mentioned as a captivating factor and an inspiration to think differently about the content presented orally. Such interpretations would be in line with current brain research (such as Brown 2009).

Teachers reported how graphic facilitation inspired them to improvise and move around, and how the physicality of the sketches invited a dynamic teaching style. A teacher could, for example, with good reason move across stage and grab a poster to make a reference in time or content, an activity that would entail pausing, moving and the use of physical gestures to grab participants' attention. The fact the the posters was produced from left to right (seen from the audience) resulted in an overview of content presented in a way where the spatial arrangement would represent time. Being able to -metaphorically- walk back and forth in time presented the teachers with an opportunity to communicate the progress of the workshop with the physical space and their own body (for similar reports, see Nørgaard 2012).

### Engaging participants in dialogue

Dialogue is a desired interaction mode between participants in most workshops and learning situations and the use of humour encompasses many emotional states that drive activity (Power 2011). The use of provocative misinterpretations or humorous metaphors in graphic facilitation supposedly sets off different emotions in the spectator. For example, the *hand-drawn quality* of the sketches is known to spur curiosity, *misinterpretation* of an argument might set off a sense of annoyance or confusion, and the *reframing* of a topic may cause surprise and laughter. Such

mixed emotions are known from previous work to motivate humans to approach others and seek dialogue (Power 2011).

An example might serve to contextualize this argument (see figure 5). At some point, the teacher would explain how a person can choose between two different responses to a situation that is clearly wrong to the person himself, but not necessarily to others. Participants were urged to discuss situations where a conflict might appear out of nowhere because one person was unable to see a situation from another' perspective. Together with the teacher the graphic facilitator explained this challenge with a humorous example. The argument was illustrated with a man in a bathroom having to use the toilet paper which - in his opinion - had been placed wrongly into the dispenser. The sketch shows the two ways the man can chose to react to the problem - with a focus on the conflict or the solution.

(insert figure 5: The sketch exemplifies two ways a person can chose to react to the problem - with a focus on the conflict or the solution. It does so by deploying misinterpretation, exaggeration and reframing in order to obtain a sense of provocation.)

The example uses misinterpretation, exaggeration and reframing in order to obtain a sense of provocation. The choice of explaining the argument with a scene from a bathroom removes it from a serious work situation, and adds an unpretentious touch to the argument while making the point very clear.

Another example would illustrate the advice from a participant about 'doing more than what is expected of you' in order to secure customer satisfaction. The graphic facilitator sketched a plumber who proudly - to a horrified woman and child - announces that he has had their annoying rabbit put down (figure 3). This is a deliberate misunderstanding of the argument in order to provoke emotions, and the result is a motif that is surprising and shocking, but also funny due to its grotesqueness.

The sketches depicted in figure 3 and 5 were later used for the booklet and to support ad hoc communication. Such sketches were chosen, because participants were observed to enjoy them and share them, and because they illustrated important learning points in a surprising way, demanding the spectator' brain to engage in interpretation.

Experiencing a professional play with arguments and serious learning points this way, seemed to inspire participants to talk, share and do the same. The motif depicted in figure 3 would, for example, invite participants to play with framing activities that they would naturally perform as part of their work, as "giving the customer more than they expect". A group of participants studying the sketches, would reframe the moving of items from a windowsill as "re-decorating" and the removing of surplus construction materials from a flat as "carrying out the trash". The last example lead to discussions in the group of whether a construction worker actually *should* remove trash from the household as an extra service if it meant no extra work.

The ability to play with the content, however, requires each individual to carry out a great deal of mental work in order to - for example reframes an argument rapidly. The activities involved in reframing include fast analysis, interpretation and association, which are important to human understanding and memory.

An important goal for the graphic facilitator is to inspire dialogue with sketches, but participants do not have to agree with or find the graphic facilitator's interpretations complete. Sibbet (2008) has reported on how disagreements can lead to further explorations of, for example, common values in the company, and seemingly, so can reframing of company values in a humorous way.

## Supporting energetic and relaxed atmosphere

Demonstrating sketching values such as 'be evocative', 'explore' and 'produce fast' involves working with fast materials such as pen and paper. The fast production of sketches will often result in a very dynamic and personal style of drawing since the graphic facilitator has no time for corrections or finesse. Earlier research has shown how the 'unpolished' and 'relaxed' nature of sketches is key to inviting people to engage in dialogue and to dare criticize interpretations (Buxton, 2007).

While the physical manifestations of explorative sketching in a design situation influences the behaviour and thinking of the people involved, the same seems to be true for the use of sketching-inspired graphic facilitation in a completely different domain. The practice of interpreting spoken dialogue into sketches real time means that the graphic facilitator is constantly moving around, sometimes jumping back and forth between several sketches, and developing them to fit the ongoing dialogue. This result is highly visible: the graphic facilitator is physically very active and she visibly produces a high quantity of work. These two factors seem to influence the atmosphere in the room because they contrast the contribution from participants and teachers in a traditional learning situation. In such situations, participants are not very physically active and their production is either invisible (mental) or highly impermanent (spoken words). Graphical facilitation, it seems, inspires by example, and boosts participants' engagement.

## Facilitate knowledge-sharing and memory

Handmade sketches seem to hold a special property that invites the human eye to look and the brain to engage (Brown 2009), but the content is not indifferent. Sketches that illustrated, for example, a story about poor customer service, would in breaks draw closer the person sharing that story in the same way that most people will be attracted to browsing photographs, if they know they appear in some of them. Similarly, sketches that made use of humorous elements such as exaggeration, deliberate misinterpretation or surprising contexts, would invite participants to closer study, followed by sharing and dialogue. Such activities require the participant to engage mentally with the content - for example explaining to a colleague why he finds the particular misinterpretation funny - and mental engagement is a prerequisite for memory.

Content that made use of humorous metaphors or re-framing of an argument, would also inspire participants to share the work at home. This was facilitated by the production of A3 collections of the sketches produced in each workshop. Since family members were unknowing of the workshop content, participants would most likely have to accompany the collection of sketches with an oral explanation of, say, the specific purpose of a theoretical model. In this manner, the collections would support repetition of workshop content making it stick better to memory.

The fact that participants would put up their printed collections of sketches in the construction trailers at work and share them with their families, may suggest that the material, the personal hand-drawn style and the attempts to contextualize learning points in a humorous way, helped the content live longer and get wider distribution.

## Conclusion and Practical Guidelines

In the following, we conclude on the relationship between graphic facilitation and playful participation in workshops. Moreover, we sum up insights into practical guidelines to help practitioners understand the value of properties of graphic facilitation such as materials used, a

hand-drawn personal style and the use of metaphors that contextualize and reframe learning points in a humorous/provocative way.

In our work, we recontextualized the practice of design sketching in order to support a playful atmosphere in a series of workshops. Design sketching is a way of working that builds on a set of goals and values related to being playful. In the case presented, graphic facilitation is deployed in order to introduce and demonstrate these values in a workshop, leading by example, so to speak.

The material qualities - the use of pen and paper, and a fast personal style of real time sketching seems to help participants engage mentally and teachers to use the sketches in a flexible way supporting their presentations.

Extensive use of humour and metaphors seemingly invite a playful approach to interpreting and discussing key learning points. Also, the study suggests that contextualizing learning points with humorous or provocative metaphors inspire knowledge-sharing and supports memory.

## Guidelines for practitioners

A graphic facilitator has great impact on a learning environment and the products will certainly influence the dialogue. Below, we present guidelines for practice in learning environments where playful participation is desired:

1. Use pen and paper or other low-tech materials. They support rapid production in large quantities, have a permanent presence in the physical space and can be used by teachers to achieve a dynamic teaching style.
2. Instigate a relaxed, cheerful and open-minded atmosphere among the participants, use humorous metaphors or re-framing of an argument. This initiates a playful atmosphere allowing participants to play with content.
3. Make room for critical comments on the sketches in order to facilitate reflection, exploration and discussion.
4. Facilitate an on-going dialogue with teachers and other stakeholders in order to discuss possible changes in practice based on observations and participant feedback. This secures that the graphic facilitation practice is adjusted and aligned with the customer's intentions with the investment.
5. If possible, make the sketches available for the participants in a digital format after the fact. This facilitates knowledge sharing, repetition and memory.

On a general level, we advocate for educational settings where participants are invited to share experiences and develop ideas together in a creative community. We understand the graphic facilitator as a facilitator of new thinking and the sketches as actors in the process, as they spur reflection, interpretation and dialogue. Our approach is inspired by the values of Anthony Dunne and Fiona Raby (2013) in striving for a playful atmosphere where participants are invited to imagine possible futures and engage in new perspectives.

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