Activity Based Inquiry using « Serious Play »

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Strategy-as-Practice: Methodological Challenges
Innovative Methods Panel
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Background on « Serious Play » Technique

- Initial work by Bart Victor and Johan Roos in 1997
- Imagination Lab Foundation established in 2000, Lausanne, Switzerland
- Principal other collaborators: Peter Bürgi, Matt Statler, Claus Jacobs, Mark Marotto
- Over 1000 managers have participated in serious play sessions
What do I mean by « Serious Play »?

- a mode of activity that draws on the imagination, integrates cognitive, social and emotional dimensions of experience and intentionally brings the emergent benefits of play to bear on organizational challenges (Roos et al., 2004)

- play-based, facilitated technique using multimodal materials
Draws on a broad theoretical landscape, for example...

- Imagination (Roos & Victor, 1999)
- Play (Roos et al., 2004)
- Hand-mind (Burgi et al., 2005)
- Multiple intelligences (Oliver & Roos, 2007)
- Analogical reasoning (Statler et al., 2006)
- Scenario planning (Jacobs & Statler, 2006)
- Guiding principles (Oliver and Roos, 2005)
- Metaphors (embodied) (Jacobs & Heracleous, 2006)
How does it work?

- Design, pre-interviews
- One or two-day workshop
  - Warm-up exercises
  - « Identity »
  - « Landscape »
  - « Emergence »
  - Debrief
- Follow-up

- Sessions videotaped, photographed, interviews transcribed
How is this consistent with S-A-P?

- Focus on what managers do
- Strategic episodes within broader strategy processes
- Study of management teams together—understanding collectively developed knowledge (Balogun et al, 2003)
Some implications…

- By shifting the mode and medium of a strategy discussion, new content can emerge (Roos et al., 2004)

He pulled the sarcophagus out of the model, opened it and said « this is our core competency ». The box was empty.
« This is absurd—we need to change »

Participants from a packaging company
Some implications…

- Visualization and dramatization can enhance strategizing (Bürgi et al., 2005)

  “Strategy suddenly became more relevant for real people like us”

  Participant from Orange
Some implications…

- By integrating unconscious or “tacit” understandings, participants are often surprised with what others and even they themselves have built and described (Oliver & Roos, 2007)

  “I’ve been working with [this colleague] for 14 years and never knew that about him.”

  *Participant from software company*
Some implications…

- Object-mediated inquiry creates a “safer” environment for emotional expression (Oliver & Roos, 2007)

  The sales manager pointed to the model—rather than to the logistics manager—to criticize logistics department

  “(Logistics) was very strongly challenged in the building session, and since I am part of it, I felt it strongly”

  *Logistics manager from chemical company*
Challenges of this approach

- Power dynamics can threaten to break the play frame
- Emotional responses should be expected and carefully managed by facilitator
- Generation of huge amount of data—it is possible to examine so many questions and often difficult to choose ones that will come out well
- Size constraints—difficult for more than ten people to work on same construction (multiple groups are possible)