

FACILITATING SERIOUS PLAY

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ABSTRACT

This paper provides a descriptive account of how researchers at the Imagination Lab Foundation designed, facilitated and followed up on organizational interventions involving a process called serious play from 2001-2005. It additionally describes the organizational outcomes observed in association with these interventions, and closes with a series of reflections on the significance of those outcomes for organizational decision making, especially with regard to the relationship between strategy process and content; the overcoming of psychological defenses; the role of power; and the cultivation of adaptive potential.

Key Words: organizational decision making, process facilitation, serious play.

INTRODUCTION

To begin, consider the following mini-case descriptions:

- The division management team from a Swiss chemical company completed a six-month formal strategic planning process and submitted their 5-year plan to the firm's senior management. Management critiqued the plan, saying that it lacked ambition and bore too much resemblance to the previous 5-year plan. In response to these criticisms, the five-member divisional team engaged in a two-day facilitated workshop, during which they constructed a representation of their organization in its business environment using several thousand LEGO pieces. As the team built and discussed their multi-colored, three-dimensional model, they identified shortcomings in their existing strategy, as well as new opportunities within the landscape. They later integrated these insights into a revised strategy document that received management approval and buy-in.
- An international paint company gathered its 20 country managers to reconcile divisive, regional differences and develop a more coherent, shared corporate identity. Over the course of two days, the managers broke into two sub-groups, engaged in a facilitated process, and played around with the serious business of their organization's identity using the media of LEGO bricks, conversation and physical gesture. They found the process painfully difficult, and they struggled to incorporate all the different perspectives at the table. By the end of the second day however, they had crafted a single, albeit multi-faceted model of their organization's identity, and they jointly resolved to refocus their

customer strategy around the elements of the model that they thought differentiated their company from its competitors.

- The strategy committee and the human resources director of a European bank gathered their 47 key reporting officers at a resort to build momentum toward the launch of a major new customer service initiative they had been planning. A team of action researchers designed and facilitated a two-day process through which six cross-functional sub-groups used a variety of toy construction materials, magnets, musical instruments and fruit to construct physical representations of their individual and collective views on banker-customer relations. Each group's model presented strikingly different perspectives, and they all raised questions about the new initiative. If customers should know their banker better, did bankers have to know their customers better too? Are some customers better to know than others are? Should the initiative focus on personnel training or the enhancement of technical systems? In view of the variety of interpretations, and in order to respond to the serious questions raised, the bank's strategy committee decided to delay the intended rollout pending further analysis.
- The creative director of a leadership development center gathered 25 business leaders and expert facilitators for a three-day forum. For two days, participants became increasingly familiar and collegial with each other as they explored a series of multi-media, expressive activities, including drumming, theater, dance, ceramics, yoga, painting, collage, poetry, singing and Gestalt movement. On the last day of the forum, a philosopher, a psychologist and a ceramic artist facilitated a serious play process using four tables, two

with LEGO and two with modeling clay. Participant sub-groups switched back and forth across the media as they constructed models representing the art of developing leaders. As each sub-group presented the model it had collectively constructed to the rest of the participants, two members of one group objected so strongly to the story told by a colleague that they threw up their hands and walked away, as other group members chasing after them offering entreaties to remain engaged in the process.

These case descriptions illustrate dozens of interventions – involving more than 1000 managers and scholars – organized by researchers at the Imagination Lab Foundation. Founded by Johan Roos in 2000 to conduct research on play, imagination, and emergence in organizing and strategizing, the Lab supported a full-time research staff and engaged with academic and business collaborators. To gather data on these topics, the researchers facilitated interventions focused on strategy processes, organizational change and development, team dynamics, and leadership.

This paper describes the facilitation practices that emerged through these collaborations over five years. It begins by clarifying some of the core assumptions that shaped and guided the collaborative activities at Imagination Lab. It then describes in detail the design and facilitation of action research interventions involving serious play (Roos, Victor & Statler, 2003; Jacobs & Statler, 2004; Statler, 2005; Oliver & Roos, 2007) in organizations. It closes with critical reflections on the positive and negative organizational impacts associated with these interventions, as well as the significance of these anecdotal outcomes for future organizational decision making research.

INITIAL ASSUMPTIONS

At an ontological level, organizations are complex adaptive systems, and decision making is a dynamic process through which transformative change can, and sometime does, emerge. Accordingly, the facilitation of organizational processes unfolds experimentally, as an open-ended intervention in a complex system dynamic.

At an epistemological level, because such dynamic processes involve unique sets of interactions among agents and unfold asymmetrically in time, it is difficult if not impossible to control all relevant variables and arrive at valid, generalizable, predictive knowledge. Imagination Lab researchers employed action research methods involving various forms of data-gathering during multiple cycles of action and reflection while focusing on an agenda developed in collaboration with event organizers and participants.

Methodologically, this paper interprets available textual and visual data and constructs a narrative about the facilitation practices that emerged over a four-year time period at the Imagination Lab. This narrative begins with a conceptualization of serious play as a process through which people can bring not only cognitions, but also embodied experiences, emotions and social dynamics to bear on their organizational challenges. This narrative provides a reference point for critical dialogue among scholars and practitioners about the relevance of different dimensions of human experience to organizational decision making.

DESCRIBING FACILITATION PRACTICES

Conversing with Practitioners

Serious play interventions typically began with a group of researchers in conversation with an organizational leader (hereafter referred to as the sponsor) who had a problem he/she thought required some kind of innovative process to address, and who had contacted the Imagination Lab to explore possibilities. Those individuals would then discuss that problem and its associated symptoms as well as the history and organizational context of the problem. They would identify those individuals who would participate in the intervention. They would additionally determine the period of time available for the intervention, and agree upon the desired outcomes of a jointly designed process.

Researchers regularly provided the sponsor with verbal and written descriptions of the concept of serious play and the facilitation methods that it inspired.¹ These descriptions focused on the integration of expressive, creative and interactive dimensions normally associated with experiential learning with the explicit content of the organization's business reality, especially serious issues pertaining to the organization's strategy. In some cases, researchers would conduct a sample pilot process to give a smaller group of senior managers a flavor of the character of the experience, and to help them reflect on how serious play could optimally fit in the context of their ongoing initiatives.

When a sponsor expressed interest in very specific content outcomes, the researchers would emphasize the difficulty of predicting or controlling the content generated by the group during the event. Since the playful process did not follow instrumental design logics, sponsors had to have some degree of comfort with open-endedness in order to proceed. Sponsors had to approach the process as a way to generate a multiplicity of outcomes, and remain willing to

¹ This research on serious play influenced, and was in turn influenced by the development of a branded process technique called LEGO Serious Play™ (LSP). For several years, the authors were licensed LSP facilitators, interacting with a community of practice comprised of other licensed and prospective LSP facilitators.

consider not only new possible solutions to the problem at hand, but also critical reformulations of it.

The researchers would generally tell stories about previous serious play interventions with similar organizations. Those stories would illustrate the principles and activities associated with action research. The researchers would also explain their own interest in developing scholarly research products based on the data gathered during the intervention. If this conversation with the organizational sponsor ended (as some did, while others did not) with an agreement to proceed with an action research project involving a facilitated intervention, then the Imagination Lab researchers would gather with colleagues and collaborators to design the process.

Designing the Process

The researchers would try first to decide what unit of analysis the process should focus on. Irrespective of the organization, the problem the sponsor had described, the group composition, etc., each process participant would construct that unit of analysis using a three-dimensional medium. Participants would eventually tell stories to each other about these constructions and their significance for the organization. It was therefore crucially important to select something – a project, a change initiative, a strategy – that all participants were already aware of, involved in, and willing to discuss.

Struggling with this choice, the researchers would raise questions about the group's size and composition. What different functional roles and responsibilities do people hold? How long have they been with the organization? Are they accustomed to working with each other? Different exercises could bring out various facets of the unit of analysis. Different sub-group

sizes and configurations would also make a difference. Should people engage more with their peers or with people at other levels of the organizational hierarchy? Should they interact with their familiars or with people they had never met? Should they build individually, in pairs, or as a group? Should sub-groups be heterogeneous or homogenous in any way? Any construction exercise could additionally involve different patterns of storytelling. Should they tell their stories in plenary, in pairs or in cross-pollinated subgroups?

Depending on the different exercises included in the process, the researchers additionally had to select materials in terms of number, type and diversity. For most interventions, Imagination Lab researchers chose LEGO bricks because they can be configured in so many different ways, because they require a relatively low level of skill (compared to other materials such as paint or even clay) to generate intricate models.² The research team also experimented with a wide range of other three-dimensional materials, including magnets, sand, paint, musical instruments, found objects such as fruit and office paraphernalia, etc.

After choosing the unit of analysis, the researchers would differentiate roles and responsibilities for each member of the facilitation team. Who should convene the group? Who should handle the various exercises? Who should pose the challenging questions? Who should take primary responsibility for taking participant-observation notes? Who should gather visual data including digital photography and/or video?

While making decisions in response to process design questions such as these, the Imagination Lab team also attempted to formulate new research questions and consider the relevance of the intervention to existing research questions. In this way, developments in

² Full disclosure: LEGO provided sponsorship to the Imagination Lab, making LEGO materials readily available for experimental use.

strategy, teamwork, and organizational development research could influence the framing of the unit of analysis.

Facilitating

Imagination Lab researchers would also frequently facilitate the serious play processes or work closely with other professional facilitators. Before participants arrived, the facilitators would set up the room and the atmosphere. Facilitators used tables big and wide enough for the construction materials to scatter across, but small enough so that people could easily reach the middle from any side. They would position the tables evenly throughout the room, and arrange the chairs so that no more than ten people would sit at a single table. Facilitators would also position the materials to provide participants with easy access to them, whether in a single bucket by the door, in large piles at the center of each table, in small piles or bags in front of each chair, or otherwise, depending on the number of participants and the conditions.

Once participants had arrived, the sponsor would typically kick off the event with a few words, and then facilitators would introduce themselves and the process. These introductions lasted anywhere from one minute to one hour – as the practice developed over time, facilitators tended to keep it short and focus on several key messages to set the frame for the serious play activity. First, they gave a quick account of the overall objectives of the session. Second, they emphasized the importance of maintaining a safe atmosphere in which people could play around with serious issues without fear of undue recrimination from colleagues. Finally, they sketched out the various process stages so that people would know the pace of the experience without knowing what would happen.

The active process would begin with a warm-up exercise, a simple construction task and a relatively short amount of time. This exercise would drive people's hands into the materials as quickly as possible, and familiarize them with the various ways that the materials could fit together. Some participants exhibited a greater learned familiarity or natural skill with haptic activities, so the warm-up enabled everyone to develop a certain minimal level of skill in manipulating the materials. It also served the purpose of illustrating the many different ways to accomplish the same task, while playing off of participants' sense of competition regarding who could build the most unique structure with the greatest speed. Following this initial exercise, and all subsequent exercises, facilitators would encourage participants to discuss how they felt about what they were doing, and what they saw in the models on the table.

Facilitators would subsequently instruct participants to take a certain number of pieces, give them a slightly longer time frame, and ask them to 'build anything' without telling other participants what it was. Anticipating already the chance to tell a story about what they had built, they reacted with surprise when the facilitators asked them instead to tell a story that refers to the model as one of a list of pre-selected objects (e.g., your car), people (e.g., the head of state), processes (e.g., your morning commute), etc. Facilitators generated a list of potential options in advance so that it would include a range of more or less difficult options. Pedagogically, the exercise emphasized the metaphorical potential of the three-dimensional medium, and additionally, the creative aspect of the group process of analogical reasoning (Statler, Jacobs, Roos, 2006). People who had attempted to build perfect, literal representations (e.g., of the office, etc.) found that meaning need not remain static or intrinsic to the model, but instead could be attributed to the model creatively by anyone who interpreted it, including the builder, the facilitator, and other participants.

To expand on the analogical and metaphorical potential of the materials while connecting the explicit content of the process more closely with the organization's problem, facilitators would ask people to take a slightly longer period of time to build a model told the story of what they themselves do, their job or primary activity. The purpose of this exercise was to extend beyond the metaphorical significance of particular pieces or constructions, and to begin additionally using the models as prompts for narrative. It also personalized the dialogue at the table to the extent that people often built their aspirations and frustrations as prominent features of their job, and presented these emotions as part of the three-dimensional model by telling their story to colleagues.

On such occasions, Imagination Lab facilitators would pose questions to the participants about the significance of particular aspects of these models. The variety of colors and shapes and configurations possible in the medium of LEGO materials lends itself in particular to a wide range of possible interpretations, where everything is potentially significant or banal. Why did you choose red? Why did you make this side so big and the other so small? Has your job always been this way? Questions such as these could lead nowhere, or they could lead to novel interpretations, elaborated narratives. Facilitators encouraged participants to pose similar questions to each other, while calling attention to different perspectives around the table.

In this manner the participants began to play with the serious problems confronting their organization. They would take a relatively longer moment to build the identity of the pre-selected unit of analysis – the organization, the project, the topic, etc. Usually this exercise would begin with people working individually in parallel, but sometimes it involved pairs or loose groupings of people roving around talking, building structures and evoking emotions, taking perspectives on the models that emerged around the table.

Sometimes people would start building immediately, while others paused for reflection, appearing blocked, etc. In cases where such blockages became protracted, facilitators would encourage people to start simply putting pieces together while thinking about something else, whistling a song or looking out the window. They discouraged people from excessive, anguished rumination, and encouraged them instead to engage with their work issues in playful manner, using a playful *mode* of intentionality in which they did not seek to control, but instead remained open to emergent change.

Participants often exhibited deeply entrenched habits of dealing with their work issues using certain vocabularies, metaphors, rhetorics and technologies, but this process allowed them to use an entirely different, three-dimensional *medium*. Working with that alternative communication medium, almost all participants could build and describe at least something – though in some rare cases, people would reject the medium outright, ceasing to participate, opting instead to complain or actively disrupt the group process by throwing materials, making noise, or walking out demonstratively.

As the energy for storytelling would begin to dissipate for better or worse, facilitators would invite participants to take all of the individual or group models, and construct from them a single, collective model of the content unit of analysis. Over time, across different process interventions with different organizations, Imagination Lab facilitators experimented with a series of simple rules to guide this difficult and important transition. They phrased these rules as exercise instructions to participants: “1) eliminate redundancies, 2) keep everything from your own model that you feel is very important, and 3) ensure that the collective model includes at least one element from each of the individual models.”

If the tables were large and there had been no previous collective construction activity, participants could begin by pushing their individual models toward the center of the table. Facilitators would pose questions about commonalities, patterns of similarity and difference. Non-directive questions tended to serve the design purpose best: e.g., does anybody see anything in common?, nobody sees anything different? Sometimes there would be a long moment of silence, and nobody would move or say anything. If the process stalled, facilitators would sometimes ask someone to step up and be the first to begin building the story. Sooner or later, participant groups would begin to construct a collective three-dimensional model of the content unit of analysis.

The variety and intensity of dynamics in group play would become especially visible in cases where two or more groups worked in parallel, and one group would jump ahead, make decisions about what to keep and what to cast aside, while another group would remain locked in stasis, with no clear path forward. In such cases, facilitators encouraged participants to work together using their hands to construct or transform the model – e.g., with everybody putting one new thing into the model quickly, or everybody taking one thing out of their model quickly, or everybody taking one thing out of someone else’s model, etc. The serious play process facilitators frequently improvised and adjusted or re-designed exercises to address emergent phenomena. Facilitators would eventually invite one or several volunteers to provide an overall, detailed narrative description of a collective construction.

Through another set of facilitated exercises, serious play process participants would construct other elements of their organizational landscape, including competitors, partners, funding sources, regulators, clients, customers, etc. Imagination Lab facilitators experimented with different specifications for these models, sometimes asking each individual to build several

landscape elements, other times asking that those landscape elements include only decision-making agents, instead of general economic phenomena such as currency fluctuations, changes in inflation, or rising consumer demand. Other times facilitators let participants build the currency fluctuation as such and then re-frame it in terms of the various multiple decision-making agents that contribute to it, such as the chairperson of the Federal Reserve or a maverick currency speculator. In any case, participants would integrate those elements into the organizational landscape, whether by setting them apart from the collective model, attaching them to each other, or otherwise positioning them in terms of their relative significance. Facilitators also sometimes instructed participants to focus explicitly on the linkages or points of connection between and among the various elements, allowing people to explore the metaphorical potential of the construction materials.

With enough time and sufficient mandate from the sponsor to engage participants in a lengthier, potentially more intense set of exercises, facilitators would ask them to reflect on the model they had constructed and imagine possible events that might impact it (regarding scenario planning and serious play, cf. Jacobs & Statler, 2006). In some cases, each participant would generate three scenarios, one likely, one possible, and one long-shot. In other cases, pairs or groups would identify three different events, at the short-, medium-, and long-term time horizons. In other cases, participants focused exclusively on the part of the model that they felt had greatest value, and imagined what threatened it. Because the design of these parameters could make a big difference in the process outcomes, facilitators would choose carefully and in consideration of many factors. In general, facilitators encouraged the participants to articulate scenarios as concretely as possible, avoiding generalities such as ‘declining sales’ in favor of specificities such as ‘losing the XYZ account because Jones botched the presentation’.

As participants played through the impact of these scenarios on the model, they had the opportunity to test the resiliency and robustness of the meaning that they had constructed together. By identifying the obvious impacts that these scenarios would have on that construction, participants could also get a sense of how prepared they were to deal with change.

As participants played through a series of disruptive scenarios, facilitators would ask them, “What is the right thing to do today in order to mitigate the negative impact of this potential future event?” If participants could answer this question, the facilitators would ask further “why is that the right thing to do?” As the group played through several of the scenarios, sometimes someone would write the answers to these questions down on a flip chart or white board. Reflecting on this list of core justifications for strategic action, participants articulated simple principles that they thought could provide guidance in the event that one of these scenarios, or one like them, should arise unexpectedly. In this sense, the serious play process would deal not only with the content of the problem identified in conversation by the sponsor, but additionally with individual and collective notions of how best to respond to unexpected events (Oliver & Roos, 2005).

As the process frame ended, facilitators would reserve a significant amount of time for reflective discussion and debrief. On many occasions, the sponsor or some participant took great care to close the frame by drawing close connections between the model and the organization itself, typically in the form of action plans or lists of tasks and next steps. Sometimes facilitators instructed participants to take written notes of the stories they found most compelling. Sometimes participants would take a favorite segment of the model back to work with them as a memory aid. At least one manager closed a session by giving the LEGO bricks to his team as a

Christmas present for their kids. Some sponsors save the entire model and displayed it at the office on a conference table. Often participants would snap their own digital pictures of the models and email them around to family and friends. Facilitators would close the session frame by thanking the participants for the opportunity to collaborate with them, pack up the gear and take the data back to the Imagination Lab, usually chattering away for several hours with each other on the train or in an airport lounge.

Following Up

When following up after a serious play process, Imagination Lab facilitators and researchers usually re-focused on the problem that the sponsor had presented prior to the event. Did the process address the problem? Did other outcomes emerge during the process? What organizational dynamics unfolded during the process?

Researchers began to answer these questions by transcribing the participant-observation notes, reviewing the visual data, and engaging with Imagination Lab colleagues in reflective dialogue. This dialogue would often focus specifically on key comments made by participants, as well as on what remained unsaid. It would address the overall energy levels and power dynamics within the group, as well as the physical body language and positioning that the facilitators observed in the room. Video cameras discreetly positioned in the corner of the room provided a wide-angle overview of the interactive and communicative process of building the models. Digital photos from a variety of angles captured images of group in action, shots of pair- and group-level interactions, shots of individual people presenting their models and telling stories to the group, and close-up shots of the models themselves.

Typically the research team would develop a set of first-order analyses and communicate them back to the organizational sponsor in a document called an insight memo. In keeping with the methodological principles of action research, these insights included what facilitators observed during the process. The insight memo typically included key digital photographs and extensive written interpretations of the data gathered. These interpretations typically included content findings and process findings – dealing at a content level with what was said or unsaid, and at a process level with how these discursive and performative interactions unfolded. Researchers typically presented these insight memos to the sponsor and all process participants. In many cases, researchers additionally had a debriefing conversation with the process owner and key participants, and discussing additional potential courses of action in the spirit of collaborative action research.

OUTCOMES

The preceding narrative about serious play practices cannot generate generalizable research findings for several reasons. First, the serious play process does not provide a uniform control variable, and the Imagination Lab research team did not attempt to systematize across various empirical settings the inherently open-ended and malleable character of play (Csikszentmihalyi, 1990). Second, the serious play process occurred in a wide variety of different organizational contexts, under different circumstances, and with different explicit process goals, a potentially wide range of additional factors shape the practices as well as the outcomes. Third, since the data derives largely from the authors' own personal experiences, it

gives rise not to objective measures, but to transparent and self-reflexive interpretations guided by the methodological notion of participant-objectification (Bourdieu & Wacquant, 1992).

Yet, Imagination Lab researchers and facilitators did consistently intervene in organizational systems using a process that introduced a new medium for communication and gave participants the opportunity to approach their organizational problems with a playful attitude, or mode of intentionality. Process participants did consistently rely on haptic, spatial and interpersonal intelligences (Buergi & Roos, 2003; Oliver & Roos, 2007; etc.) in addition to the verbal, logical and mathematical intelligences (cf. Gardner, 1983) more commonly relied upon in organizations. Facilitators consistently called upon participants to relax their desires to command or control situations, and to remain intentionally open to emergent change within the frame of the play process. These activities led to positive as well as negative outcomes.

Positive Outcomes

Almost invariably, participants reported gaining *new insights* into the unit of analysis that the process focused on. People would consistently jump up from their chairs and rove around the room to gain different perspectives on the model as others built and described it. For example, once a six-member strategy team saw their organization laid out on the table in three dimensions, they realized that they had previously held at least four different understandings of the term ‘network’, a term that figured prominently in their strategic plan. In another case, participants realized that an important customer service initiative meant very different things to different people in the organization. In another case, a senior leadership group from a major nonprofit organization realized that they had collectively been constrained by the symbolic presence of their charismatic founder, even though he had been dead for years. In such cases, the insights led

participants to reconsider the problem that had driven them to engage in serious play in the first place.

Participants also consistently reported that the serious play process had led to the development of *different social relationships* with their peers and colleagues. For example, the members of a leadership team of an information technology firm had not previously taken the time, in the course of their hectic and fast-paced organizational environment, to understand each other's roles and responsibilities. However, once they built and saw each other's jobs as well as each others' models of the organization's identity, they realized how much they actually had in common. They reported that on the basis of that realization, they began to share more information and work more collaboratively with each other. In another case, functional and divisional managers blamed the senior manager in charge of logistics for slow delivery. That individual found himself forgiven by his peers once they saw the complexity of the organization's operations built out in three dimensions. In another case, when a managing director used a very detailed model to tell a story about the difficult relationship he had with his own boss, the room fell silent, and other participants expressed a new appreciation for his predicament. One participant stated that he could now accept the managing director as one of them. Furthermore, when the managing director honestly portrayed the difficulties of his working relationship, it set a tone for honest and open dialogue that had not previously existed among the group. As one participant explained, "I've been working with this colleague for 14 years and never knew that about him."

Participants also consistently reported experiencing *positive emotions* during the sessions than would be typical of a normal meeting of those same individuals. Most commonly, participants exhibited the kind of affective dynamics associated with having fun, as manifested

by laughter, smiling, excitement, and unbridled enthusiasm to continue. For example, the HR director of one company drew everyone's attention to his good humor by climbing up onto the table to add a component to the emerging construction. Some participants claimed that they had "never had so much fun at a strategy meeting" and others made jokes about how they should not "let their colleagues back at the office know how much fun" they had during the process.

Beyond the general climate of light-heartedness, participants also consistently expressed higher levels of emotional commitment and acceptance of the serious issues on the table. In several cases, people reported associating positive emotions with the other participants who had shared the experience, and in at least two cases, participants reported feeling better about the organization as a whole because it provided a place for them to engage in serious play. As one participant wrote in a comment sheet, process participants could get "to know each other in a more genuine way" and start "to commit as people, and not as status, role, power, etc."

Negative Outcomes

On various occasions, participants expressed a degree of confusion about the purpose of the activity and its relationship to the overall purpose of the group or the organization. In some cases, participants complained that they found the process a distraction from the critical matters at hand, a waste of time that could have been spent dealing with the same problem in a more customary fashion. Some participants reported that the process was unnecessary to develop the outcomes, and that a traditional verbal discussion would have led to the similar outcomes in a shorter amount of time.

Power dynamics in the group would occasionally intensify. Because the process of meaning construction left so much room for interpretation (as opposed, for example, to financial

analysis of ‘the numbers’), it sometimes made it more difficult for people to defend themselves against domineering or abusive colleagues. In addition, beyond clashes of individual personalities, certain power dynamics endemic to specific organizational cultures intensified within the frame of the play process. For example, in organizations with established cultures of hierarchically-based evaluation, some participants expressed a fear that their constructions and contributions to the discussion were not sufficient to gain approval. In several cases, Imagination Lab researchers found out after the fact that evaluators were in fact present and active during the process, to monitor the extent to which constructions mirrored or complemented the model constructed by the senior executives in the room.

On several occasions, participants reacted to the process with intense, negative emotions. In one case, a participant became so upset with another group’s representation of the organization that her voice began to waver and she began to cry. In another case, a participant became increasingly frustrated with his perceived inability to construct and describe his models. After the third exercise, he began to make loud disruptive comments, and by the fourth exercise, he began to throw materials around the room and at other participants. In addition, on the occasion described in the vignette above, two members of a sub-group announced that they could not continue with the process because of their intense disagreement with the narrative presented by another participant.

Longer-Term Outcomes

Some of the longer-term impacts and outcomes that various participants attributed or traced back to the serious play process include:

- A manufacturing organization decided to revise its entire 5-year strategic plan.
- A services organization decided to abandon an unrealistic organizational learning initiative.
- A manufacturing firm decided to re-focus its strategy development process on key account management.
- A telecommunications firm decided to re-emphasize its historical brand image following a merger process.
- An information technology firm decided that it should focus more attention during its strategy development processes on the expertise in the human resources function.
- The leadership team of a large nonprofit organization decided on the basis of the insights they had gathered during the process that they should be more aggressive with their organizational change efforts.
- A telecommunications firm decided to design and develop an organization-wide management development program based on the serious play process.
- An international non-government organization decided that it could not go forward with the rollout of a management development technique without the firm commitment of its senior leadership.
- The senior management of a large national bank decided that they needed to obtain the buy-in of the front line staff to implement a new customer service initiative effectively.
- A rapidly-growing company decided that it needed to downplay the influence of its home-country national culture on the organization to pursue its global expansion more effectively

- A consumer products company decided that it needed to diversify its distribution channels in order to keep pace with changing demographics.
- A manufacturing firm's leadership team decided that they needed to improve the quality and frequency of communication among themselves.
- A group of university leaders decided to move ahead with a campus-wide diversity initiative.

REFLECTIONS

So then, what is the significance of these outcomes for organizational decision making, and for the facilitation of organizational decision making processes?

New Process, New Content

Other action research intervention data supports the notion that changes in an organization's strategy process can lead to changes in strategy content (cf. Roos, Victor & Statler, 2004). Reflecting on the facilitation practices described above, the serious play process involved a distinct *mode* of intentionality (i.e., playful openness to emergent change), as well as alternative *medium* in which to express strategic content (i.e., 3-D manipulatives). Moreover, in view of the outcomes reported in association with these facilitation practices, specific shifts of mode and medium appear to have enabled participants to generate new insights about their organization and the problems faced by it.

Beyond the playful mode and the 3-D medium, another factor may have contributed to the generation of new insights. Unlike standard, discursive decision-making processes in which

certain voices dominate and others recede, the serious play process explicitly included content generated by all people present. Of course, not all constructions equally captured the attention of other participants, but each participant did have his or her own constructions out on the table where other participants could see them, comment or ask questions about them, and even incorporate them into their own models. Thus whereas often the qualitative parameters for group decision-making activities are set in advance by a team of analysts or by the senior leadership, serious play process participants all contributed to the exploration and definition of the terms of the debate.

The projective aspect of the serious play process appears as another factor that contributes to the generation of insightful content (Barry, 1994). Although from a rigorous psychoanalytic perspective, organizational actors always project meaning, whether onto spreadsheets and presentation slides or onto a pile of modeling clay, clay may provide more of a blank slate than a spreadsheet, if only because the spreadsheet remains so embedded in existing habits and patterns of communication. By giving participants the opportunity to project tacit, unconscious meanings on ambiguous, and multi-dimensional, multi-colored objects, the serious play process allowed them to express new thoughts and feelings. Even participants whose voices would typically dominate reported saying things that they had never said before, and the projective aspect of the process helped to make that happen.

Overcoming Defenses? Yes, But...

Privately-held, tacit knowledge and affect can additionally lead to biases and conflicts in organizational decision-making processes (viz., Hodgkinson & Wright, 2002; Maitlis & Ozcelik, 2004). Indeed the possibility that processes involving three-dimensional representations of

strategic decision content can serve to overcome such psychodynamic defenses motivates research as well as practice focused on cognitive mapping (Huff & Jenkins, 2002). The serious play process did on many occasions appear to break down individual psychological defenses as well as social antipathies that had previously inhibited decision-making in that organizational context. Participants sometimes reported the models they had built represented the organization more accurately and truthfully than any other internal document. Other times, after a participant had presented an emotionally-sensitive aspect of his job, others would appear more willing to put themselves and their own aspirations on the table.

But while emotion can constrain cognition, the reverse can also be true. Sometimes a preconceived notion (e.g., about a colleague's role in the organization) appeared to preclude the experience and expression of emotions that, from a process perspective, would have enabled more effective decision-making. In view of the research data presented here, any attribution of causality with regard to X constraining Y with effect Z should meet with skepticism. In the Imagination Lab facilitation practices, emotional, social and cognitive dimensions of human experience did not function discreetly from each other, but instead functioned so interdependently as to appear co-constitutive.

Even if it were analytically possible to differentiate these dimensions of experience and control for variability in any one of them, any organizational system would still include a multiplicity of dynamics at different levels of scale. At these different levels, emotion A might constrain cognition A but enable cognition B, while cognition B constrains social dynamic C but enables social dynamic D, and so forth. In more practical terms, the same emotional constraint on the same cognition may have positive and/or negative effects on the decision-making process and content depending on the time frame as well as other dynamics within the organizational

system. Thus while ‘think harder’ may serve in controlled experiments involving undergraduates to limit the damage that accrues due to framing biases (Wright & Goodwin, 2002), experienced people in real-life organizational contexts may on occasion respond well to other admonitions including ‘think less’, ‘feel more’, and even ‘play seriously’.

Power & Decision-Making

Other researchers have made similar claims – for example, the relevance of power dynamics to decision making processes has been well established (e.g. Pfeffer and Salancik, 1974; Eisenhardt & Bourgeois, 1988). Although such dynamics play out in ways that may often be invisible to external facilitators, the serious play frame and process structure often did serve to de-emphasize the importance of hierarchical power. Each participant had to engage in the same, occasionally embarrassing, process of constructing a model using materials not commonly found in the workplace. Frequently the most effective builders and original storytellers were not necessarily those with the highest hierarchical position in the room. Thus instead of rewarding the ability to comprehend and phrase jargon-laden statements about the nature of the organization, this process called for the ability to construct models and tell original stories. The process had the effect of broadening and democratizing the interaction and exchange of opinions about important organizational issues among participants, making them more open and less prone to self-censorship due to concerns associated with power issues.

At the same time, this observation also leads to caution about the potential for misuse of this particular technique. Since participants frequently made very open and revealing statements about themselves or about what might be considered sensitive issues during the process, facilitators of such processes should remain sensitive to the possibility for abuse by individuals

in power, and, if necessary, intervene to mitigate such occurrences. More broadly, decision making researchers need to acknowledge the extent to which the strategic landscape as well as the parameters of value (i.e., +/-) are not objectively pre-existing, but instead creatively enacted by the participants, shaped by narrative convention as well as power dynamics, and subject to transformation and renewal.

Adaptive Potential

People who make decisions in organizations deal as a matter of course with a certain degree of uncertainty. At a process level, people commonly use decision-support techniques designed to reduce that uncertainty, whether through algorithmic modeling or statistical analysis. At a certain point however, the utility of such techniques may be limited, and organizations require other techniques that incorporate an experiential confrontation with unexpected change. Indeed, in cases of extreme or protracted uncertainty (e.g., due either to the time horizon or to volatility in the environment – cf. Weick & Sutcliffe, 2001) organizations simply cannot reduce uncertainty. In such instances, they strive instead to identify and develop sources of resilience (Sheffi, 2005) or robustness (Eccles & Nohria; Light, 2005) that enable the organization to become more prepared for unexpected events (Statler & Roos, 2006; Statler & Roos, 2007).

In this sense, Imagination Lab facilitation practices involved attempt to increase the adaptive potential of decision-making processes in organizations. Just as scenario planning may require technologies of foolishness in complement to technologies of rationality (Jacobs & Statler, 2006), organizational decision-making processes may require a measure of serious play in order to remain resilient and adaptive in the face of change.

Psychological research on play amply supports this claim, most notably the finding that the sheer ambiguity of play provides a frame within which humans can express adaptive variations (Sutton-Smith, 1997). Organizational researchers have additionally recognized that improvisational play at the workplace can have significant benefits associated with learning, personal fulfillment, and even performance (e.g., Starbuck & Webster, 1991; Ibarra, 2003; Sandelands & Buckner, 1989; Hatch, 1999.).

By facilitating serious play interventions in an open-ended, experimental fashion, Imagination Lab researchers enabled participants to gain new insights, interact differently with their peers, and feel more satisfied and committed to their organizations. In addition, participants put cognitive, social and emotional dimensions of their own experience directly to use – both by attempting to solve a particular problem, and also by cultivating their own individual and collective capacity to adapt to emergent, and unexpected change.

DIRECTIONS FOR FUTURE RESEARCH

This chapter described serious play interventions designed and facilitated by researchers at the Imagination Lab Foundation. This fine-grained description of facilitation practices can serve as a basis for insights relevant to the organizational decision making research literature. In particular, the facilitation described here represents an attempt to draw upon more of the emotional, imaginative, context-specific, and human elements of decision making (Langley et al., 1995). In this sense, the study follows a stream of research into notions of “intuitive” decision making (Simon, 1987) by providing a context within which participants could draw upon their unconscious understandings and impressions. By involving managers in developing

shared constructions of their organizations in their environments, the facilitated serious play process drew on social, emotional and embodied aspects of their human experience in addition to rational cognition.

A change in the *process* of decision making enabled the generation of novel decision *content* in these organizations. The process of projecting meaning on multidimensional objects led to the expression of new thoughts and feelings which were then integrated into a wide variety of decision outcomes. The facilitated serious play interventions de-emphasized established power hierarchies by imposing what was for many a radically novel form of expression on all participants. The process encouraged participants to think through scenarios that emerged in the course of the play activity, thus providing a context for testing prior assumptions and possibly modifying existing knowledge structures used in organizational decision processes.

While scenario development has been widely studied (e.g. Schoemaker, 1993), much of this research is grounded in assumptions of rational cognition. Future research might continue to explore forms of scenario development that include social, emotional and embodied aspects of human experience in addition to purely rationalist ones. In particular, the area of organizational aesthetics focusing on the role of embodied perception in judgments of fit and proportion (cf. Guillet de Monthoux, 2005), may prove particularly fruitful to better understanding organizational decision-making processes.

Additional questions relate to the use of storytelling in decision making processes. A number of scholars have called for further analysis of the role of narratives in organizational life (c.f. Dyer & Wilkins, 1991). Indeed, the notion of storytelling as an informal social process through which emotional as well as cognitive dimensions of decision-making (cf. Oliver & Roos, 2005; Oliver & Jacobs, 2007) applies to the practice of using stories to describe their complex

constructions. Future decision making research could focus not only on the ways in which decision parameters and optimality criteria are shaped by narratives, but also on the interplay between cognition, emotion and physical performance as organizational actors construct and interpret models of their organization.

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