

Developing Strategy

The Serious Business of Play

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You can discover more about a person in an hour of play than in a year of conversation.

—Plato

Strategy development in organizations is serious business. The origin of the term *strategy* in the work of ancient Greek army generals, or *strategoí*, underlies the traditional view of strategy as comprehensive analysis and planning that is rational, analytical, objective, and top down. With this prevailing emphasis on left-brain activity and ways of thinking, the lack of systematic development or widespread use of emergent, right-brain ways of approaching strategy development and strategic leadership should come as no surprise. Leaders in search of such creative ways to foster innovative thinking and strategizing within their organizations have too often been left to luck, coincidence, or their own devices. What options are available to support their efforts?

This chapter examines the important role of play in creative strategizing and leadership effectiveness. We begin by exploring the

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links between play and effective strategy and describe how current art- and humanities-based approaches to leadership development and a play-based strategizing activity can bridge false dichotomies in management thinking that limit creativity. Then we compare strategizing through serious play and traditional approaches and discuss the organizational benefits of learning to play with serious intent. We conclude with advice on ways to play seriously in conducting organizational planning and with a discussion of the important role of leadership in this process.

LINKING PLAY, LEADERSHIP DEVELOPMENT, AND STRATEGIZING

Developmental psychology and anthropology have long known that play enhances critical cognitive and interpretive skills and engenders a sense of emotional fulfillment at every stage of human development (Sutton-Smith, 1997; Winnicott, 1971). Play is also inherently group or community oriented and as such contributes in important ways to the development of shared language, identity, and social practices among those involved (Huizinga, 1950). Play provides a safe environment conducive to surfacing, debating, and diffusing assumptions, values, and ideas—its potency and energy deriving from the imaginative, fresh, and experimental issues that surface and from the context of the play itself. In light of what research tells us about play's multiple benefits, organizational strategists' neglect of play as something irrelevant, messy, ambiguous, or subjective seems ironically nonrational.

However, engaging senior managers in play activities to develop shared views of company mission and vision, speculate about competitors, act out different scenarios for an industry's future, or even spark or test novel strategic directions is unthinkable in many management circles. What would enlighten these organizations and strategic leaders to understand the value of what we like to call *playing with serious intent* (Jacobs & Heracleous, 2005, 2006)? How can such play be orchestrated with maximum impact?

One set of management education experiences sheds light on the positive power and possibilities of play for increasing workplace effectiveness. In recent years, organizations as diverse as Unilever, McGraw-Hill, and the Boston Consulting Group have employed arts- and humanities-based executive development programs that use jazz

improvisation, art appreciation, theater, poetry, and other creative modes to foster imagination, critical self-awareness, flexible thinking, collaboration, and improved presentation skills (Seifert & Buswick, 2005; Mirvis & Gunning, 2006).

At Oxford University, for example, the Strategic Leadership Program, which is designed to further leadership development for those in top organizational positions, takes its participants through several creative sessions of self-discovery. In one, senior leaders are asked to visit the Ashmolean Museum and select an object that they particularly like. This is followed by a plenary session during which the leaders are shown with their chosen objects in large photographs and asked to engage each other in discussion of why their chosen objects spoke to them and what this says about them as individuals and as organizational leaders. In another session, leaders are asked to select a poem that speaks personally to them, prepare and recite it to the group, and then engage with others in joint sense making about the impact and meaning of the poem for them.

These arts- and humanities-based techniques share a similar approach of drawing on an artifact—a piece of art or a poem in the Oxford program. In other instances, toy construction materials, such as Lego blocks, Play-Doh, magnets, or simple wooden bricks, might be used to the same ends. These activities use what psychologists call a *projective technique*, that is, they capitalize on the human capacity to experience the world at levels deeper than simple cognition through engaging with objects and then externalizing and examining the experience. Long used in psychotherapy, projective techniques aim at bypassing the conscious, linear, rational self to draw on subconscious, prereflexive thoughts, emotions, assumptions, and perspectives that, once surfaced, can be shared and debated.

These activities also share similar principles that are important for our discussion here. They offer an important vehicle for a kind of reflection and learning that bridges several false dualities permeating management thinking: the dichotomies between play and work; art and business; mind and body; reason and emotion; structure and ambiguity. As they engage in these activities, leaders are helped to appreciate the limits arising from holding tight to these dualities and the benefits arising from seeing connections rather than differences. They see existing issues and challenges in a new light: the letting go and shifting gears in these playful activities enables leaders to access parts and levels of their experiences,

their brains, and their consciousness that they do not ordinarily use. More important, the leaders are offered a model that they can bring back to their workplaces for strengthening key competencies for effective strategic leadership: opening up options, using new lenses to see things differently, tapping into imagination and inventiveness, and fostering meaningful individual and organization development.

An example of how this model has been applied successfully to strategy development shows its possibilities. Senior management teams from multinational companies were asked to use a variety of three-dimensional materials to develop shared representations of their organizational world. Team members were asked individually and then collectively to build representations of their company, its competitive landscape including key stakeholders, and the perceived relations among these elements (Buerger, Jacobs, & Roos, 2005). The results were complex and imaginative, and the development process involved energetic and intellectually demanding debate.

The representations became, in essence, *embodied metaphors* of the different organizations, which could then be explored, compared, and decoded by the participants. They offered the same access to new ways of seeing that the senior leaders at Oxford experienced when examining their leadership through engagement with art from the Ashmolean. We use the term *embodied metaphors* to capture two distinctive features. First, there is newness in the direct relationship between the participants and their constructions. The resulting representations are not existing metaphors from individual participants' cognitive repertoires but shared creations constructed through an iterative, interactive, team process over a period of time. The creations then hold, or *embody*, the beliefs and understandings of the collective. And second, the constructions are not verbal metaphors or one-dimensional representations like maps or matrices. They are tangible entities extending into three-dimensional space and can be touched, moved, and examined from various angles—affording, for example, an interesting metaphoric look at the underbelly of an organization. They are ripe with interpretive meaning for individuals and for the collective team. The meanings build and manifest themselves during both the construction and discussion phases of the activity, as the dynamic nature of play allows the executives to express more ideas and emotions in their creations than they may initially be aware of themselves.

Such sessions effectively combine strategizing with the highly dialogical and imagery-rich process of playful sense making. In our experience, participants find the sessions demanding, involving, energizing, insightful, and enjoyable. We have observed strong individual and shared motivation during the activity, as well as bonding among managers whose relationships may have been less than close beforehand. We have also seen increased organizational capacities for employing valuable insights from the experience, even when the outcomes are emotionally, politically, or cognitively challenging. Even though the process of strategizing is lighthearted and playful, the outcomes and consequences are serious and relevant.

COMPARING SERIOUS PLAYING AND TRADITIONAL STRATEGIZING

Playing with serious intent is more complex than simpler idea-generating techniques, such as brainstorming. It is a structured method of thoughtful reflection and interaction with lasting consequences. The images and metaphors that participants develop remain part of the organization's strategic conversations long after the play has ended. However, this kind of playing with serious intent is not a substitute for conventional strategizing. It is a complement. Serious play is to traditional strategizing as strategic thinking is to strategic planning. Strategic thinking is free-wheeling, innovative, and divergent; traditional strategizing is analytical, convergent, and conventional. Strategic thinking discovers imaginative strategies and envisions novel futures; strategic planning operationalizes strategic directions and supports the strategic thinking process (Heracleous, 1998). Both processes are essential for competitive success and can be used in different sequences. Creative play sessions, for example, can begin the strategic visioning process and develop generative thought that will then be sorted and operationalized through more convergent and analytical planning processes. Alternatively, serious play sessions can follow strategic planning activities, serving as a means of surfacing and stimulating open discussion and debate about the meaning and interpretation of various strategic decisions.

In 2003, for example, the CEO of a Swiss-based, private banking group planned to launch a major, go-to-market strategic initiative (Jacobs & Heracleous, 2006). The initiative was labeled "I know my

banker" and aimed to provide a more distinctive, customer-focused, private banking service drawing on the creative use of traditional banking processes and supports. To kick off the initiative the CEO invited department heads and their direct reports to a one-day retreat where participants would explore the new strategic concept and its consequences through the creation of representational models of the organization after the change. The hoped-for retreat outcomes were to create shared understanding of the new initiative and to achieve clarity about new actions needed to implement it.

The serious play activity enabled the participants to engage safely in intense debates and discussions on a range of important issues: who the customers for the new service should be; how to actually encourage customers to get to know their bankers better; what the initiative might mean for the group's definitions of the banker's role; whether the initiative was a technical systems effort, a customer relationship marketing activity, a data-mining approach, a new method for building client trust, or some combination of these; and more. The embodied metaphors built were a potent way to surface and explore the issues and the differences in group members' assumptions about these issues.

For example, one construction presented the bank as a complicated machine bigger than the client's space and the banker-client relationship as one in which the bank worked to match its offerings to clients' demands—a rather technocratic, mechanistic, transactional interpretation of "I know my banker." This contrasted with another model that portrayed the initiative as a series of progressively closer banker-client relationships and deeper mutual understandings—an anthropocentric, developmental, relationship-oriented undertaking. These major differences surfaced easily and in a nonthreatening manner as participants compared the models, and had a significant impact on subsequent bank actions. The CEO saw the lack of shared understanding. He requested that the head of marketing postpone the initiative launch and redesign the "I know my banker" program—this time using a more inclusive process and close collaboration with the department heads as well as some of the workshop attendees. A few months later the redesigned initiative was introduced more smoothly than would have been possible before the serious play retreat. Table 25.1 summarizes the characteristics of traditional strategizing techniques and strategizing through serious play.

Traditional Strategizing	Strategizing Through Serious Play
Approach is planned, deductive, analytical, top down.	Approach is emergent, inductive, based on narrative, group oriented.
Analysis process aims to reduce complexity, sanitize, normalize.	Construction process aims to highlight richness, interrelationships and interactions, expansivity.
Strategist is detached, objective, distant.	Strategist is attached, engaged, personally and often emotionally involved.
Output is plans, charts, figures, conventional statements.	Output is 3-D constructions; embodied metaphors; unique, visible, and memorable artifacts and meanings.

Table 25. 1. Characteristics of Strategizing Approaches.

BENEFITS OF PLAYING WITH SERIOUS INTENT

Serious play produces five central strategic benefits for a company. First, play produces *insights and potential shifts in managers' mind-sets* that are difficult to gain through other, more conventional meetings and sessions. For example, the senior strategist team of a company we'll call TelCo, a leading European mobile phone service provider recently acquired by a major competitor, gathered to review the company's strategy through serious play. The team's shared construction portrayed the organization as a flotilla of ships moving toward a lighthouse that represented the brand. Each ship represented a specific country's operations. When constructing the organization's environment, one participant suggested that an overlooked, powerful competitor from another part of the world might be "coming in from left field." She placed a large, bulky model of the competitor on a bookshelf behind the table to illustrate that even though the competitor was not in TelCo's current landscape, it was ominously present and eyeing TelCo's market. The sheer size of the competitor's model, its location and looming posture, sparked a debate that helped the strategists acknowledge their previous blind spots. They also considered potential responses and actual scenarios for dealing with the potential competitor, doing so with an urgency and focus that would have been difficult to muster without the power of the visuals before them. Creating concrete representations of inherently ambiguous strategic issues is a potent way to focus and mobilize timely, action-oriented responses.

In the same workshop, participants zeroed in on their brand as needing to be addressed. The physical representation of the brand as a lighthouse looming over the landscape led to realization that rather than guiding or driving the company, the brand might in fact be a barrier to swiftly maneuvering in the right direction. This led to the playful but richly symbolic gesture of moving the lighthouse from the front of the table to the back, behind the flotilla of ships—and examining how team members felt about this. In addition to encouraging a discussion of the brand and its effects, this exploration led the team to reconsider the design and focus of an upcoming, large-scale executive training and development program that had originally been designed around the organization's conception of its brand.

Serious play sessions like these expand individual diagnostic and planning skills in the short and long term. Repeated play sessions enable participants to become more proficient in exploring out-of-the-box alternatives and seeing multiple points of view. The result is higher levels of executive flexibility and organizational adaptability. Once a concrete representation is developed and examined—as opposed to an abstract idea discussed—individuals also seem to find it easier to face personal or organizational blind spots. Over time, mind-sets shift and developmental growth occurs.

Second, play provides a safe context in which senior teams can *surface and discuss contentious or critical management issues*. For example, the senior team of a leading food product packaging company was divided on whether after-sales activities were of strategic relevance or a mere *hygiene factor* that could be outsourced to third parties. Team members engaged in serious play, constructing models of their organization and its environment, including key competitors and clients. The company was portrayed as a large, solid, inflexible castle and the competitors were portrayed as moveable, adaptive pirates' nests in the sea surrounding the castle. The senior team examined the construction by looking at the situation from the customers' perspectives. Team members suddenly appreciated the strategic relevance of after-sales activities for customer satisfaction and retention and subsequently explored potential alliances to help the company provide world-wide, high-quality after-sales service.

Third, play *surfaces issues that have been seen as politically sensitive or undiscussable*. For example, constructed models can reveal how the CEO and the senior managers are viewed by others in the organization. We have found that these constructions often show the CEO

positioned higher than or physically detached from the representation of the organization itself. These CEOs often wear symbols of power like a crown or sword—sometimes they even hold a whip or look away from the organization—and are depicted leading the way. Although activity participants may not be immediately able to explain the reasons they represented their CEO in a certain way, the reality of the embodied metaphor invites a safe, yet important inquiry into CEO and senior manager behavior and how these executives are viewed by the rest of the organization. Sometimes leaders are irritated by the way they are depicted. Most are surprised and recognize that playful exploration of their image, role, and behavior can prompt a much richer and more honest discussion than *360-degree feedback* and other evaluation techniques can. An unexpected or contradictory representation of the CEO offers group members a context for shared sense making. This feedback is also grist for the leader's personal growth and leadership development.

Fourth, group-oriented, interactive play develops and draws on rich imagery, metaphors, and stories, not just facts, figures, and statistics. This in turn enables organizational members to *develop a memorable shared language* for future work together. Individuals report that their insights and the embodied metaphors from the sessions continue to inform their thinking, improve their organizational strategizing, and break down walls of interfunctional or interdivisional separation. When members of the strategy department of a leading global cell phone production company gathered to review their strategizing processes and practices, they constructed a model of their organization as a set of loosely connected physical structures clustered around a central tower. A porous, dotted line represented the brand as the integrative force of the firm. The core of the construction was surrounded by a set of gates representing portals to future issues that the organization would need to address—issues that ranged from adversarial concerns like hostile acquisitions by competitors to potentially beneficial organizational options like strategic alliances. The dominant, unifying metaphor of gates to the future enriched the strategists' awareness that there were several potential futures and gave them a shared language for discussing their options, choices, and plans.

Fifth, playing seriously *enhances the involvement and ownership of organizational participants* and contributes to team building. For example, the European members of the senior management group of a leading U.S.-based software company gathered to encourage

a common identity and foster lateral collaboration in their recently formed and highly diverse management team. They constructed an urban landscape with diverse structures that could connect to each other only through "antennae relationships" with the managing director or other centrally located senior individuals. The representation highlighted the difficulty of achieving a common identity and collaboration among the different country operations under the current conditions. It also focused team members on exploring why the difficulty existed and working together to determine appropriate actions. Participants were energized by their recognition of the challenge before them. When the group was exploring how the company was perceived by competitors and customers, one participant became so excited that he climbed on the table to add a feature to the model.

HOW TO PLAY SERIOUSLY AND THE ROLE OF LEADERSHIP IN PLAY

A prime function of leadership is strategic visioning and opening organizational options for the future. How then can a company best play seriously to achieve these ends? And what is the role of leadership in fostering productive play? Playing seriously may not always be the most appropriate choice for an organization's stage of strategizing: it manifests differences and creative tensions and lends itself best to times where novelty, difference, and ambiguity are appreciated and productive. Leaders need to understand their organization's strategic stage and needs, the purpose of their use of serious play, and their reasons for involving others. Serious play is more appropriate in the early stages of strategy development and in critical reviews of implemented strategy, for example, than it is in the stages of operational planning and in performance reviews.

Paradoxically, playing with serious intent cannot be spontaneous. It must be organized, supported with adequate resources, and simultaneously flexible to allow creative "foolishness" to emerge at the same time that a serious focus on delivering useful insights on real strategic issues is maintained. This points to prerequisites for organizational leaders: they must do their homework and know what the organization's significant strategic challenges are, commit to exploring these challenges fully, and allocate the necessary time and resources. Rushed play sessions lose their effectiveness: functional and goal-constrained thinking takes over.

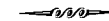
A skilled facilitator helps to ensure the healthy and productive generation, debate, and integration of ideas. Such a facilitator is aware of specific play dynamics, can ensure a group-created embodied metaphor and genuinely interactive process, and can probe for the hidden meanings in the group's representations. Why, for example, does a group choose to portray a 3G license as a tiger and an elephant tied around the organization's symbolic neck? Why is the CEO of the acquiring company holding a machine gun and accompanied by black-hat-wearing accountants? Why are the organization's strategic planning processes portrayed as disoriented animals in search of direction? Why are the interconnections among the corporate divisions portrayed as broken? What should the organization do to address the issues and challenges identified? And so on.

Playing with serious intent is holistic and encompasses elements of strategic issue identification and scenario development. It is crucial for the success of a play intervention to capture all the issues, questions, potential answers, doubts, scenarios, and stories surfaced by the technique and to translate them into a format and record that makes them accessible and useful in other subsequent and more formal stages of strategy development.

Leaders face a special challenge in serious play. They need to muster and demonstrate emotional maturity and gracefully accept the feedback and implied critiques of their own and their organization's shortcomings and strategic misalignments. At the same time, leaders need to demonstrate that they take the play seriously and to enhance their own acceptance, ownership, and commitment to the outcomes by playfully participating in the process with others. Leaders who do this are also cautioned to relinquish control and behave as open and equal members of the construction team. Any defensive or dominating behavior on their part may cause the group to produce "politically correct" representations and a meaningless exercise. Leaders gain the most from the process when they come prepared to share their own stories and metaphors, recognize the power of involving participants not usually part of strategy-developing teams in the process, allow freewheeling discussion and respectfully listen to explorations of controversial or contentious issues, and appreciate the added benefit of learning about the mind-sets of subordinates who are crucial for company success.

Taking play seriously means taking the outcomes seriously too. There is plenty of hard work that needs to happen after the play

sessions to translate the insights and directions into workable processes and actions. It is the leader's overall responsibility to ensure that this important work is done and that the organization is prepared to address even controversial outcomes in a respectful, productive, and developmental manner. Playing seriously is an enjoyable way for organizations to differentiate themselves from their competitors and overcome strategic obstacles. It may not be as simple as it first sounds, but playing with serious intent is worth every bit of the investment.



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