Role-Play
Realising its Potential for Workplace Learning

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The practitioners who introduced role-plays to workplaces in the 1940s and 1950s found they could transform employee relations, staff selection and ways of conducting meetings, conferences and job-related learning (Bavelas, 1947; Zander & Lippitt, 1944; Miller, 1951, 1953; French, 1945; Stahl, 1954; Williams & Folger, 1948; and Lippitt & Hubbell, 1956). They noticed it made learning dynamic, less theoretical and more relevant to real life.

Since then, the use of dramatic enactment such as role-play in workplace settings has become commonplace. Role-play activities are a taken-for-granted component in the design of workplace learning and development. A related form of enactment, the assessment centre, is used by employers as a basis for staff selection and to review the performance and development needs of key personnel. The use of professional actors or playback theatre companies to enact workplace issues, is also well established in training workshops and at conferences.

Yet, is the true potential of role-plays conducted with job-related learners themselves really being met? Quite a number of learners report that they 'hate' role-play or that they find it artificial, embarrassing and, at worst, exposing or even punishing.

It is my own experience that role-play can generate relevant and engaging learning experiences but only if facilitators grasp its full potential and discover how to use it well. In this article I will outline what I have learned about key elements of effective role-play, with illustrations from a range of settings.

Defining Role-Play

Role-play is a means of exploring a given problem or situation in action and trying out a variety of responses to it. The participants are free to try and fail in the role, knowing there will be opportunities to try other alternatives, until a new approach to the situation is learned and can be applied in real life (Moreno, 1966, cited in Fox, 1987). When conducted well, role-play has an explorative, provisional and experimental feel. It can be seen as a 'warm-up' to improved performance without being too focussed on *completely achieving good performance.*

Role-play can be followed up by individual or group role training to hone in on the particular role or roles that require development, rehearsing for and developing adequate performance. Similarly role-play can be used as a springboard for sociodramatic exploration of the conflicting values at play in the situation under review. Sometimes these conflicts are

usefully acknowledged before role training for improved performance commences.

My Own Application of Role-Play

My own application of role-play typically takes place with groups of 10-16 learners in half-day or longer training events. I ensure that participants are oriented to the workshop focus through a range of interactive activities including spectograms. During these activities I model a high level of interest in the group members, encourage them to build mutual relationships with each other and work to establish group norms of openness, acceptance and ease with the use of action methods.

I frequently work with material generated by the group on the day, giving them an opportunity to select which situations they most need to work with or are interested in exploring.

I commonly structure role-plays in two different ways. One is to conduct a role wheel, an approach I learned from Anne Hale (USA) and Colin Martin (NZ). Participants stand in two circles - one inside the other. People on the inside circle face outwards and are partnered up with someone in the outside circle. They are encouraged to come up with immediate responses to situations in which their partner takes the counter role. These interactions are brief and participants often get to take both roles in the scenario. As the scenarios being worked with change, participants in one circle step to the right and are re-matched with a different partner. This is a noisy, often high-energy activity in which participants are relatively free from the scrutiny of the group as a whole.

I find the role-wheel a useful starting point for role-plays. If time and purpose allows I typically progress from a role wheel to a group-centred role-play, sociodrama or role training session. Group-centred role-play is the second way of structuring role-plays I often use. It involves some participants taking up roles in the enactment and others being audience members. As those watching a role-play have a different level of engagement to those taking an active part (Kipper & Uspiz, 1987), I adopt a number of techniques to engage the audience as much as possible. These include: involving them in the preliminary interview; asking them all to model alternatives to the whole group; and pausing the action to have them try out an approach with a fellow audience member. This form of role-play often explores the concern of an individual protagonist chosen by the group and is therefore concluded with a formal process of sharing or reflection.

In conducting role-plays I have identified several key elements for success. These are outlined below.

Relevance

It is essential that role-plays are highly relevant to the learners involved. If they are, they generate enormous interest and keenness to participate.

Sometimes it is appropriate to pre-design role-plays, particularly if you expect the group to be inhibited about bringing forward relevant material. I have done this in authoritarian or risk-averse organisational cultures. The challenge is to uncover, prior to the learning event, a range of scenarios that most people can recognise as realistic. The more specific they are, the greater their dramatic interest.

For example: *"Here you are at a cocktail party and an overseas dignitary touches your bottom and suggests you come back to his hotel after the function or you see him sexually harassing one of your work colleagues. How will you respond?"* or *"Here you are working alone in a noisy warehouse environment with one other worker who refuses to talk to you. How will you respond?"* *"Here you are working in a foreign country where homosexuality is a criminal offence and you overhear your colleague 'outing' your gay workmate to the local staff. Go ahead and respond to them."*

Pre-designed role-plays are valuable if you are working with tight time constraints. There is an

economy in warming the group up to a number of very crisply explored scenarios and having them generate thoughtful learning reflections.

However, even within short time constraints the skilful facilitator can draw out and work with specific concerns from the group that are of most relevance to them on that day. This makes the learning engaging, as the group has high 'ownership' of the issue and its resolution. This approach can be useful with newly-formed or diverse groups of individuals; and when there are significant differences in knowledge of the context between the facilitator and the group members.

For example: in working with a group of managers from Pacific nations I discovered that a pre-prepared role play on mentoring techniques was less relevant than a spontaneously constructed role-play on how to maintain confidentiality (a cornerstone of the mentoring relationship) in communities where the managers experience considerable pressure to break it, in keeping with wider cultural norms of interaction related to a 'diffuse' rather than a 'specific' culture (Trompenaars, 1993). The group role-played responses to a mentoree who asks *"How do I know I can trust you? I've got something I want to tell you about my life but I don't want anyone else to know."* and later responses to the mentoree's manager who says *"Tell me about my staff member. What do you think of him and what is up with him at the moment?'*

The beauty of this approach is that the role-play is finely attuned to meeting the most current and pressing needs of the learners.

Playfulness

There are many pressures on us to 'get it right' at work. 'Getting it wrong' can have big repercussions for our clients, our professional relationships, as well as having an impact on our reputation and self-concept, something we are often acutely aware of. This creates pressures on us in role-play situations - for example, we don't want to upset our colleagues or be judged

to be incompetent. The pressure to 'get it right' experienced by participants and the facilitator can undermine role-plays unless the facilitator really grasps the value of learning through play and how to make that happen.

An effective role-play requires a playful, experimental atmosphere. In the early stage of a role-play it is important as a practitioner to avoid being evaluative yourself or asking the group to evaluate their own or others' efforts. Crisp use of a role-wheel goes a long way to increasing spontaneity and reducing the group members' scrutiny and self-consciousness.

Another approach which helps is inviting group members to start with a response they know *won't* work, and a few minutes later come up with *another* response that won't work, and then a response that *might* work.

During this early stage of a role-play I focus on enjoying myself as a group leader and accepting and appreciating the variety and life being expressed by the group, some of which can be very funny and sometimes provocative. This all helps relieve a lot of anxiety about 'getting it right' and frees the group members to experiment in more of a free-for-all where a wide range of behaviours can be enacted. As they continue, their efforts can be increasingly channelled towards a wider range of effective responses to the situation.

Spontaneity theory, one of the cornerstones of psychodrama, informs this way of working. Without this knowledge a facilitator might feel unnerved, irresponsible, off-the-mark or lost when the group becomes playful. With spontaneity theory as a touchstone, the practitioner can learn to trust that true playfulness unleashes the spontaneity of the group and that in turn the group's capacity to respond with vigour, freshness, originality, imagination, practicality, creativity and adequacy will emerge.

Purpose/Focus

In shaping a role-play to be relevant and developing a climate of experimentation the practitioner is co-creating a certain 'warm up' with the group. The term 'warm up' in this sense means a certain focus, predisposition and mood in the group. The facilitator can do a lot to shape the warm-up of a group.

It is useful for the facilitator to be clear about the kind of warm-up that is suitable for the group and the learning context so that participants feel 'safe enough' to participate and learn. One aspect of this is having a clear and transparent purpose and mandate to work with the group on certain issues. This provides an anchor as you work. For example: *"In this session we will focus on your capacity to give useful performance feedback or to develop your abilities to be an effective influencer."* (And by implication, although this doesn't need to be said, *"We are not here to redesign the performance review system, develop your parenting skills or to help you decide on your next career move, although you may be reminded of these issues as you work."*)

Appropriate Level of Disclosure

Another aspect of warm up is clarity about what level of personal disclosure is appropriate to the work and the context. Warren Parry (1980s) identified six fields of warm up used in psychodrama, each of which involves different levels or areas of personal disclosure. One of these fields is a warm up to *'typical'* situations in which the practitioner invites the group to address (in this case in a role-play) what typically happens between parties (such as between a union delegate and an employer, or a sales person and a product development person). This requires minimal personal disclosure by members of the group, as they identify common dynamics which they may or may not have experienced themselves. This can be a rich source of role-play material. However, work at a 'typical' level can risk veering off into the stereotypical, which reduces its sense of freshness or reality.

Another of Parry's fields involves participants warming up to themselves in their role: *'you as a... manager/ nurse/ teacher/ consultant/ judge/ counsellor'*. This field of warm up involves greater disclosure of the concerns they face in their occupational function and builds a very compelling and unifying warm up which engages participants in real situations they can all relate to.

The third field of warm up, the one most relevant to workplace role-play, involves participants disclosing material about actual working relationships, described by Parry as *'you in your current social atom'*. A sound level of expertise in group work and production skills is desirable to facilitate role-play at this level, in particular to manage the amount of information presented; the active engagement of the group; and to develop an open and ethical group culture which respects all parties portrayed in the role-play.

Briefing/Interviewing for Role

Participants in a role-play need to be well orientated to or prepared for the role they are being asked to play. This is where many pre-designed written role-plays fall down, as they fail to engage participants in a way that brings the role-play to life.

Interviewing the group or briefing the group about their role deepens their level of engagement and activates their spontaneity. This can be done by getting each half of the group together to identify what is important to the person they are about to play. Alternatively, and more economically, the practitioner can brief each party in the role-play in a crisp manner.

For example, in a role wheel, the practitioner addresses the inner circle: *"Those of you in the inner circle, you are the peer reviewer who has observed your colleague in action in the courtroom. Your job is to give this person in the outer circle feedback on one area where they could lift their performance. You have noticed that they use little eye contact with the parties and delivered their judgement looking*

down or over the tops of their glasses. Overall you think they are doing a good job but that they come across as impersonal and removed. You think that the behaviour you noticed is probably outside of their awareness. In a moment I'll ask you to go ahead and have a go at letting them know about this. Now those of you in the outer circle, your job is not to 'go over the top' or be the most difficult person you can. Just notice what your colleague says and does and let that affect you. And respond as you would. Now, peer reviewer in the inner circle, you go ahead and start this conversation."

Authenticity

A useful role-play encourages participants to discover the value and limits of their current approach to a situation and to try out expanding their own repertoire of responses. For this reason when I facilitate a role-play I encourage participants to start by 'having a go' at handling a situation in their own natural way.

This expresses confidence in their existing capabilities and values a diversity of approaches amongst group members. It helps reduce their anxiety about 'getting it right' and helps them enter into the situation as an action experiment in which they are free to learn in their own way. It also sends a signal that they can be authentic in the learning group and that their actual experience of the situation is of interest to others. This level of authenticity deepens the participant's level of engagement.

Later in the role-play they may build on their repertoire by adopting approaches modelled by others in the group. Once the group begins to focus on role training they will probably also be willing to try extra approaches suggested by the facilitator or the group.

Diagnosis

Encouraging group members to start with their own natural style also gives the facilitator the chance to observe and assess the group's overall proficiency in the relevant role behaviours, the breadth of their role repertoire, and the range of capabilities in the group.

These insights help the facilitator choose suitable interventions. For example, if participants enact a 'mentor' role as *Long-winded Advice-givers,* they can be encouraged to continue with the use of more inquiry and curiosity about the mentoree's particular situation. Similarly, if those in the peer reviewer role show a good level of inquiry, sensitivity and attunement with the peer they are reviewing, they can be encouraged to bring forward the difficult feedback they may be postponing.

Crisp and Precise Production

Workplace learning sessions are often undertaken within considerable time constraints, sometimes ruling out the possibility of using role-play altogether. More often, in my experience, role-play is possible and adds value, but only if the facilitator is crisp and precise.

The facilitator must be emotionally present and able to develop an open learning climate in the group for their crispness and precision to work. Otherwise, crispness and precision can be experienced as bullying, are likely to be rejected by the group and may do damage.

I am fortunate to have had some good role models of crispness and precision amongst my own trainers and colleagues, some of whom I will mention here. Colin Martin (former Director of the New Zealand School of Training for Trainers) was masterful in eliciting a role-play scenario from a group member who had volunteered to set out their situation. Colin would conduct a brief interview standing alongside the participant in front of the group, asking *'what is it that she/he says or does in this situation?'* and *'what is it he/she says or does that you find particularly challenging?'* With these few words he would elicit the verbal or action component at the heart of the situation being explored and this would be enacted immediately as a role-play.

Anne Hale taught a number of crisp production techniques in the use of a role wheel which I have found invaluable. She conducted a

succession of very brief versions of the role-play, encouraging participants to try another and then another response; inviting a 'fast forward' to another point in the interaction; quick shifts as those in the role wheel stay where they are but take up the other role; and crisp moves around the role wheel giving participants the chance to enact with another role-play partner. Anne also modelled the use of 'spotlighting', where participants in a role wheel listen in to and watch a quick series of role-play pairs re-enacting their encounter.

When these crisp changes in activity are facilitated well they heighten the openness, spontaneity level and resourcefulness of the group. I have found my own precision and crispness has increased with practice and as my capacity to make an assessment of the group's learning needs has sharpened.

Reflection
Role-play must incorporate reflections about what is being learned. This need not be only at the end of the role-play but can occur as the role-play proceeds. One approach I prefer, which I first saw modelled by my colleague Bev Hosking, is to ask the participants to share with their role-play partner what they noticed about 'which approaches tried worked well and which didn't work so well.' In line with adult learning principles I may ask the role-player to reflect on their own effectiveness first, and then hear from the person in the counter role. Participants are then invited to report back their general conclusions to the whole group. Following this the group can then be invited to keep going or try a different scenario, with these reflections in mind.

General reflection about what worked and what didn't work in the role play is a good place to start, followed later in the session by more direct feedback about the impact of the role-player on their partner (in role) and what they might consider doing differently. This progression fits with the early emphasis on playful experimentation and the later attention to achieving more effective performance.

Conclusion
Role-play has a lot of value in generating highly engaging and relevant learning and reflection. To realise its potential the facilitator needs to devote a great deal of attention and care to the 'warm-up' process. Early attention to purposeful play and experimentation, rather than more focussed training for improved performance, can help the facilitator liberate the spontaneity, resourcefulness and creativity of the learning group. Role-play works well when the learner is respected as an authentic, self-expressive, person experiencing and developing moment to moment. In addition role-play offers an invaluable tool to assess the role repertoire and development needs of the group.

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