Towards a theory & framework of professional role play: A thematic analysis of a management development workshop that harnesses the skills of a professional role play actor.

Stephen Cornes
University of Warwick

Abstract

My research examined a business learning workshop that used a professional role play (PRP) actor as a key element in developing client facing behavioural skills. My research focused on the three specific areas of: (1) tools and techniques the professional actor employs (1); framework the actor used to manage learning during a role play (2); the learning of the participants (3). This paper is a distillation of my thesis and details the research process and the outcomes identified. I gathered data by reviewing the film of role plays. Six case studies consisting of two role play sessions and two feedback sessions were repeatedly watched and transcribed. The transcriptions were analysed using thematic analysis and the theories of Open-space Learning (OSL) were used to frame the research.

The results identified the six actor technique themes of specificity of language, managing the imagined space, body language, challenging and rewarding the participant, facilitating, and feedback from the characters’ perspective. It also identified the six participant learning themes of business-specific learning, meeting structure, questioning technique, use of language, use of body language, and the ability to build rapport, work collaboratively, and demonstrating empathy. From this, I hypothesised a theoretical framework for, and refined the concept of, PRP. This research will benefit educationalists in the design and delivery of behavioural learning workshops and working with professional actors in education. It will also benefit business schools and
organisations in creating learning specific to workplace interaction and communications. I consider my research a starting point for future research into behavioural learning for the workplace.

**Keywords**: role play; behavioural learning; business education; adult education; experiential learning; business skills; simulation; embodied intelligence; coaching.
Introduction

This research focuses on understanding the role play approach with a professional actor, not whether the workshop objectives are met. As such, the research considers all that occurs, not just those aspects associated with the predetermined workshop objectives. To do this, I proposed answering the following questions:

1. What do the participants learn when working in role play with a professional actor?
2. What techniques does the PRP actor use?
3. How do the participants learn when working with a PRP actor?

In its simplest terms, I wanted to understand better the process of profession role play in business and define role play with a professional actor as separate from other forms of role play and dramatic learning.

Focus of the research

This study investigated a business workshop entitled ‘Achieving Client Value’ that used a Professional role play (PRP) actor as an integral aspect of its learning approach. This two day workshop consisted of a first day focused on theoretical understanding and a second day focused on practicing the application of the theory using role play. Due to the research being situated in a business environment, much of the material employed on the workshop cannot be divulged. The workshop objective is to create a competitive advantage (Barney, 2002) through improving employee communication skills, achieved through new approaches to training (Porter, 2001). The intended learning outcomes were:

• the ability to decide what negotiation strategy to use when meeting a client;
• the skill to recognise when to begin the negotiation;
• being able to apply the theory and techniques effectively during client meetings;
• understanding the client position;
• the ability to generate mutually beneficial solutions and come to agreement;

The behaviours exhibited that show these outcomes as being learned included:

• Forming succinct, appropriate questions;
• gathering data about the clients circumstances;
• recognise the style and personality of the client and adapt own behaviour accordingly;
• recognise the needs of the individual during the client meeting;
• manage the interaction and emotions;
• purposefully employ appropriate body language;

The research focused on day two of the course. The participants are given two 15 minute roleplay meetings with the PRP actor (who plays the client) to practice the theories learned the previous day. Feedback is given following both meetings by the actor and the other participants. Most importantly to this research, these role play interactions and the feedback are filmed as part of the learning process. These filmed interactions provide the source of the data for this research.

**Rationale**

The use of professional actors is neither a new nor an untrusted approach in Business Learning and Development (L&D) (Beirne & Knight, 2007). Yet there is much confusion regarding the term role play and the role play approach (Kodotchigova, 2002). Venable (2001) identifies a
A variety of terms used as alternatives to the term role play. I expand on this in the literature review. This creates confusion around the term role play and using a professional actor as part of the role play process adds another dimension. Only through a thorough examination of the professional actor operating in this field can a true understanding of PRP be identified.

It is important to recognise the three unique features of this research. First, the sensitive nature of business workshops means business L&D is rarely the focus of pedagogic research. Second, my review of the literature identifies role play research taking place in a medical, therapeutic or psychological environment, but not in business. Finally, the use of professional actors can skew research to focus on the dramatic, rather than the educational, aspects of the phenomenon. This research will consider PRP from an educational perspective.

**Literature Review**

The literature review considered a variety of fields to understand the pedagogic theories that underpin the process of role play. I considered both the individual and the why and how of their learning, and the theories that frame this learning. My literature review also considered both the physical and psychological *imagined space* (Neelands, 1992) of the role play. The multitude of definitions of role play creates a barrier to research (Kodotchigova, 2002). The term role play itself has variations in spelling such as roleplay, role-play and Role Play. The term can also be substituted with, and by, simulation, gaming, real play, skills practice, and experiential learning.

Much research claiming to use role play does not outline or discuss the role play element of their research (for example Cleland et al., 2009; Colucci-Gray & Gray, 2009; Mooradian, 2008; Petracchi & Collins, 2006). Such an assumption becomes a barrier to the research. Definitions that considered imagination (reflecting the learning environment), interpersonal (reflecting the
business challenge), and the emotional and intrapersonal (the participant understanding themselves) were most useful and led to a literature review focused on psychology, education, drama, and simulation and gaming.

The literature review showed that role play is complicated by the myriad of interchangeable terminology employed and the environment in which it occurs. It is a learning and therapeutic tool that uses a variety of forms of learning. Using a socially interactive situation, it encourages the participant to enter an ‘as-if’ world to learn about themselves and the way they communicate with others ‘in the moment’. It recognises the importance of receiving and processing information and the improvisation and spontaneity required to influence the outcomes of a social interaction. The objectives of role play include the changing of attitudes, beliefs, behaviours and feelings, and the improvement of improvisation techniques, competence, and comprehension. There is also an ever-present second objective of interpersonal skill building. Both the interpersonal and intrapersonal abilities of the participant are developed through ‘reflecting in’ and ‘reflecting on’ actions (Schön, 1983).

Understanding these various aspects of role play provided a foundation to investigate the pedagogies that inform role play. These include, but are not limited to, Experience Based Learning, Problem-Based Learning, Active Learning, Situated Learning, Social Learning Theory, Teaching-in-role, and Imagined Experience and Open-space Learning (OSL). Having reviewed each of these pedagogies, I chose to use Open-space Learning as the pedagogical framework for framing my results.

OSL is a trans disciplinary pedagogy that builds upon a workshop based approach to learning (Monk et al., 2011). OSL encourages an active, and physical engagement with the process and tools that enhance learning and asks participants to address and consider their own physicality in
relation to the space and the learning (Monk et al., 2011). Monk et al. (ibid) emphasise the physical space as well as a between, or ‘trans’ space. These ‘trans’ spaces deconstruct impediments to creative learning and connect different disciplines and modes of learning. These trans spaces include:

• transgressive - failure is celebrated as learning and the relationship between facilitator and participant is fluid;
• transcendent - employs learning approaches beyond auditory;
• transformative - empowers participants to create their own understandings;
• trans-rational - understanding from intuition and feeling as well as rational process;
• transactional - the learning space provides an opportunity for open exchange of ideas;
• transdisciplinary - can operate outside of the classroom and aid learning in other fields;
• transcultural - engages participants from different fields and learning approaches.

Recognising these trans spaces in PRP will provide an opportunity to connect theory and practice and result in a stronger understanding of the pragmatics of PRP.

Methodology

This research had unique access to a business workshop allowing for a direct study in situ. This unique access was granted as I was the PRP actor employed on the workshop. This posed some interesting methodological and ethical challenges. To manage these challenges, I adopted a qualitative research approach that mirrored the social constructivist philosophy (Denzin & Lincoln, 2005) of the phenomenon.
As noted in the literature review, role play is holistic, is employed in a multitude of environments, encourages learning by different means, and uses different approaches. Any attempt to build understanding runs the risk of ignoring the influence of the professional actor and it would be a mistake “to pursue causal explanation at the expense of establishing understanding” (Pidgeon, in Richardson, 1996: p.76). It is exactly the integrated, multifaceted, multilayered, omni-relational uniqueness of role play that I find most fascinating and most deserving of scrutiny. In recognition of the qualitative nature of this social research, the social and interactive nature of role play (Yardley-Matwiejczuk, 1997) and the inappropriateness of a logical positivist approach, I chose to approach the research using a qualitative naturalist ethnographic case study approach.

The research is structured by a social constructivist interpretive paradigm (Denzin & Lincoln, 2005). It recognises that there are multiple realities (relativist ontology), that in the imagined interaction the actor and the participant co-create understanding (subjectivist epistemology), and that the interaction actually occurs (naturalistic) (Denzin & Lincoln, 2005: p.21). The research was naturalist, gathering data directly from the phenomenon as it occurs. It positioned the phenomenon as the primary concern of the research rather than prioritising the methodological theories employed (Hammersley & Atkinson, 2007).

This naturalistic stance was significant as I was also performing the role of PRP actor. I chose a non-participant observation strategy that identifies a distance between researcher and participant and chooses not to investigate the symbolic sphere or interfere or influence the actions of the observed (Silverman, 2011). A participant observation approach could provide unique insights into the phenomenon but would prioritise the research over the learning of the participant.
I focused on six participants who attended the workshop on different days. Each participant undertook two role plays and two feedback sessions. Each participant was considered a case, or “bounded system” (Stake, in Denzin & Lincoln, 2005: p.444). The data for each case was gathered from two filmed interactions and two filmed feedback sessions creating a “concentrated enquiry” (Stake in Denzin & Lincoln, 2005: p.444) intended to “reveal the properties of the class to which the instance being studied belongs” (Guba & Lincoln, 1981; p.371). A case study, as detailed by Merriam & Simpson (2000), is “an intensive description and analysis of a phenomenon or social unit” (p.108). It is as much a method as a strategy and undertaking six case studies is a strategic attempt to set up comparisons (Punch, 2009). Punch (ibid) identifies one type of case study as the collective case study, an approach whereby the several cases are examined to “learn more about the phenomenon, population or general condition” (p.119). The collective case study satisfied the three requirements of the phenomenon of role play (1), the actors involved in the interaction (2) and the conditions in which these interactions occur (3). It was the most suitable approach to this research.

**Ethical challenge**

My role as the PRP actor raised an interesting ethical challenge. To mitigate this risk, I chose the non-participant observation strategy to create distance between my research and my work. I asked a colleague to randomly choose the six case studies that would be scrutinised. Choosing only six cases studies raised questions concerning generalisability. The generalisability is affected, and controlled, through the research design and the representative nature of the sampling plays a part in this (Merriam & Simpson, 2000). Silverman (2011) does not consider generalisability in ethnography as an issue, considering it odd that results from an ethnographic case study could be anything but generalisable. Horsburgh (2003) considers generalisability in qualitative research as seeking situational, rather than demographic, representativeness. Generalisability is the extent to
which the theory developed from this research can be exported to explain the experiences of other individuals in comparable situations. As such, I believe this research can be applied to other PRP interactive situations. Furthermore I believe this research transcend the business boundary and can be applied to PRP actors working in other learning environments.

Data gathering

I began by conducting interviews and surveys with the directors of several role play companies and the PRP actors. These revealed some interesting data regarding experience, but did not provide any useful data regarding the tools and techniques of PRP. These two pilots directly asserted that the most productive approach to learning about PRP was to study the phenomenon directly.

To do this, I chose to use film recordings as the data source for this research. May (2002) states that the use of film recordings “provides us with a resource with which to analyse ‘situated’ action, as it emerges within its ordinary ecologies” (p.103). Silverman (2011) outlines an experiment which shows that ethnography is “anything but a highly subjective methodology” (p.28) whilst at the same time recognising that subjectivity is ever present as it is in all methodologies. Silverman (ibid) believes this is due to the observational focus of ethnography and its focus on behaviour over attitudes and opinions and that human behaviour is “stable in time” (p.29) and, therefore, generalisable. The role plays were filmed as part of the workshop feedback process. From a research perspective, the camera did not represent an intrusive approach.

To analyse the film recordings, I used thematic analysis grounded in a social constructivist paradigm. Braun & Clarke (2006) describe thematic analysis as “a method for identifying,
analysing, and reporting patterns (themes) within data. It minimally organises and describes your data set in (rich) detail” (p.6). Using thematic analysis allows both the physical and verbal aspects of PRP to be analysed. Merleau-Ponty (in Smith et al., 2009; Valera, Thompson & Rosch, 1993) argued that the world and the individual are inseparable and that the world is understood through people’s bodily engagement with it. Clark (1998) describes this as ‘continuous reciprocal causation” (p.163), where world events are continuously influencing our actions and our actions are influencing these events. Emotions have an embodied and inter-subjective quality and are, therefore, part of this continuous engagement with the world (Smith et al., 2009). Emotions are central to the creation of meaning from experience (Damasio, 1994; Smith et al., 2009). Particularly relevant to this research is Damasio’s (ibid) opinion that feelings have a primacy within the body, developing first, and that they are inextricably connected to the body, thus pervading all aspects of our lives. Filming the interaction, and using a thematic analysis, captures both the verbal and physical nuances of the interaction.

Results

The results from the research fell into four categories. The first three concerned the questions the research posed as identified in the introduction. The fourth concerned other identifiable themes.

There are six key themes concerning the participants’ learning from role play with a professional actor. These learning themes were business-specific learning, meeting structure, questioning technique, use of language, use of body language, and the ability to build rapport, work collaboratively, and demonstrating empathy.
Six themes were identified concerning the techniques of the professional actor. These are specificity of language, managing the imagined space, body language, challenging and rewarding the participant, facilitating, and feedback from the characters’ perspective.

To answer question three, the results of the analysis pertinent to question 2 were used as a foundation for identifying the academic technique employed to bring about the learning theme. The techniques employed by the actor must be grounded in academic theory and it is through identifying this academic theory that I hypothesised the how of PRP. This iterative process is detailed in Table 1.

**Table 1. Identifying Academic theory associated with Themes.**

<table>
<thead>
<tr>
<th>No.</th>
<th>Theme</th>
<th>Sub Theme (Code)</th>
<th>Academic Technique</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Specificity of language</td>
<td>Answering closed questions with a closed answer</td>
<td>teaching in role, truth on stage</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Answering open questions with an open answer</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Answering multiple choice questions by choosing an option</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Giving Clues</td>
<td></td>
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<td></td>
<td></td>
<td>Emotional language</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Managing the Imagined Space</td>
<td>Managing learning inside role play</td>
<td>teaching in role, improvisation, spontaneity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Keeping the rules</td>
<td>ZPD, as-if world, truth on stage</td>
</tr>
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<td></td>
<td></td>
<td>Breaking the rules</td>
<td>ZPD, as-if world, truth on stage</td>
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<tr>
<td></td>
<td></td>
<td>Pause/ Silence</td>
<td>teaching in role</td>
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<tr>
<td></td>
<td></td>
<td>Nervousness of the participant</td>
<td>ZP and truth on stage</td>
</tr>
<tr>
<td>3</td>
<td>Body Language</td>
<td>Physical Movement</td>
<td>ZPD, as-if world, truth on stage, teaching in role</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Facial Expression</td>
<td>ZPD, as-if world, truth on stage, teaching in role</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mirroring</td>
<td>ZPD, as-if world, truth on stage, teaching in role</td>
</tr>
<tr>
<td>4</td>
<td>Challenging &amp; Rewarding the Participant</td>
<td>asking a question</td>
<td>teaching role, zpd</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Changing the subject</td>
<td>teaching in role, zpd</td>
</tr>
<tr>
<td>5</td>
<td>Facilitating</td>
<td>Managing the Space between the role play and the feedback</td>
<td>joker/ facilitator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>control</td>
<td>joker/ facilitator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Focusing the learning</td>
<td>mantle of the expert</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Managing the participants learning</td>
<td>facilitating</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Positive language</td>
<td>joker/ facilitator</td>
</tr>
<tr>
<td>6</td>
<td>Feedback from Character perspective</td>
<td>Referencing “him”</td>
<td>Joker</td>
</tr>
</tbody>
</table>

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1 The additional theme of learning specific to the operations of the business was also identified.
Discussion Section

The results detailed above were used to create a greater depth in understanding of the phenomenon. First, I framed the discussion using Open Space Learning (OSL) as a pedagogical framework to identify learning outcomes, the techniques employed, and the learning theories. I chose this approach to ensure the broad range of theories identified in the literature review were considered. This resulted in a comprehension and appreciation of PRP learning, a definition of PRP, and a working definition of the role of the PRP actor in business workshops.

Defining professional role play

The literature review demonstrated that defining the concept of role play is a difficult proposition (Kodotchigova, 2002; Venable, 2001). The results from this research provide an opportunity to define the PRP process and position it as a distinct form of learning. I propose the following working definition of PRP:

A learner-centred approach incorporating an imagined experience, enhanced by the process of ‘teaching in role’ that focuses on the specific learning needs of the individual, that supports the practical development of communication skills and problem-solving cognitive reasoning knowledge.

I highlight that this is a working definition as it is overly complicated, attempting to capture too many theories, thoughts and ideas. It is a complex phenomenon and I very much hope that others will continue to research and better understand this industry.

Defining the concept of professional role play

This section provides clarity on the role of the actor. The actor manages the learning space of role play which consists of the three key factors of the Zone of Proximal Development (ZPD) (Ohta, in Lantolf, 2000; Lantolf & Appel, 1994; Lantolf & Thorne, 2006), Truth On Stage (Alraek
Lantolf & Aljaafreh (1995) recognise that determining a learners ZPD is an enacted experience of “negotiated discovery” (p.54). In essence, the tutor ‘judges’ the ability of the participant, challenges them appropriately, and, with the aid of the tutor, supports them to perform above their level of competence (Lantolf, 2000). Truth on stage encompasses everything that occurs on stage (in the role play simulation) and is necessary in creating a credible learning space between the “two positions of acting and not acting” (Alraek & Baerheim, 2005: p.12). This truth relies heavily on the actors’ ability to maintain the credibility of the space through reacting spontaneously and their ability to improvise (Alraek & Baerheim, 2005). The learning objectives are defined by the topic of the workshop. From this, I suggest Model 1. as a theoretical framework for the learning space of role play.

**Model 1. Professional actor role play responsibilities**

The PRP actor, in conjunction with the participant, creates and maintains this theoretical space to facilitate and expedite learning by embodying an adeptness of multitasking to aid learning. Management of this theoretical space is a skill of the PRP actor and distinguishes PRP from other forms of role play. I speculate that the reservations associated with working in role play concern the ability of non-professional role players to manage these dimensions.
Expanding upon this model I recognised that the PRP could be considered facilitator, teacher, architect, coach, and lecturer and, from a business learning perspective, the PRP represents the embodiment of best practice. With all this responsibility and skill in managing the learning space and the learning of the individual, I felt the term actor became redundant and inaccurate. In recognition of the responsibilities of the actor, the expertise of the participant group, and the heavy influence of experience on the process, I propose the term Experiential Coach.

Conclusions

Having completed a review of the results and completed a discussion that considered the results in relation to the literature review, the following points came to light:

• PRP is a learning technique, supported by OSL, that employs certain aspects of drama. The trans aspects of OSL can be seen throughout PRP.

• The learning is outlined by the workshop objectives, but is not constrained by them. This transcendent characteristic places PRP as an OSL strategy.

• The PRP learning space relies on intuition and physical response, building the self-efficacy of the participant and highlighting deficiencies.

• Learning occurs in multiple directions, in different ways, and at different levels. It is a holistic approach to the communication learning process.

• The actor exists in a trans space between the real and fictional worlds, embodying both and providing a pragmatic bridge between the two.

• The learning is outlined by the workshop objectives, but is not constrained by them.

• The role play process develops understanding of ‘being’ and ‘being there’ (Clark, 1997) and through this process, experience is acquired (Sogunro, 2004).

• The PRP process educates the individual about themselves and confronts them with their own beliefs and attitudes (Roine, 1997; Colucci-Gray, 2009).
Proposal of the 10 R’s of professional role play

From these points, I proposed a theoretical framework that I have named the “10 R’s of Professional role play”. They are;

1. Realism - ‘Truth on stage’ is managed by the actor as a means of ensuring participant specific learning.
2. Reflection - PRP provides a reflective space that informs the participant’s self-awareness..
3. Reciprocal Causation - Continuous reciprocal causation occurs throughout the learning process.
4. Reaction - The experiential coach is not acting but reacting to the actions of the participant.
5. Relationship - The interaction between the participant and the actor in a PRP is a relationship that relies on intuition and physical response.
6. Recognition - The process insists on recognition by both the experiential coach and the participant. Both the participant and the actor must recognise their own actions and their effect.
7. Responsibility - In the imagined space the responsibility for creating the learning space belongs to the experiential coach and the responsibility for learning lies with the participant.
8. Resilience - The learning is not inhibited by a rigid process yet it must demonstrate resilience to ensure learning occurs. Its fluidity demonstrates its resilience.
9. Relevance - The learning is specifically relevant to the individual though the learning may transcend this intention and others may also learn.
10. Response - The objective of the imagined space is the participant’s practical application of a suitable response to the problem facing them. Practising such a response is the domain of PRP.
In summary, my research shows that PRP is one form of Open-space Learning that embraces, and can be used in conjunction with, a large number of learning theories. It is an ecosystem of learning, incorporating both a community of learning theories as well as the ability to bring a human, interactive, physical and emotional aspect to the biosphere of learning. PRP uses techniques that encourages learner centred learning by moulding itself to the individual needs of the participant. The resultant levels of learning and the ability of PRP to incorporate both cognitive and behavioural learning make it perfectly suited to the educational demands of the modern business environment.

References


