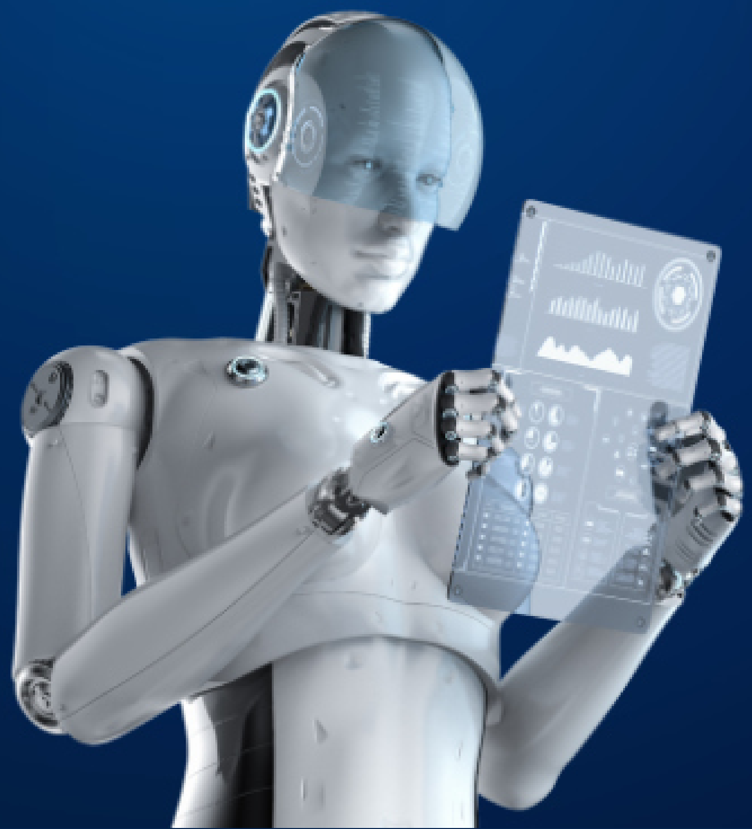


AI SIMGEN PERFOMAX

Ready to solve today's problems and embrace tomorrow's opportunities?

The World's First ChatGPT-Powered Simulation Generator

Contents

Reasons Why Role Plays Succeed Or Fail

Common Reasons For Ineffective Role Plays

Many participants hate role play exercises. That is a problem because it is undoubtedly one of the best methods of developing interpersonal skills in a safe situation, and of bringing alive behavior that would otherwise never see the light of the real world.

The most common complains are:

- Participants often feel very exposed by the group.
- Participants cannot take the scrutiny of their colleagues.
- Participants don't like to play in front of a video camera.
- Participants think that role plays are often unrealistic.

How Training Professionals Assess Role Playing

Criticism comes not only from participants but also from training experts. The criticism of behavior training is diverse and sometimes quite inconsistent. It is legitimate that behavior training is criticized. Since the significance of behavior training grew strongly over the last years, this criticism was to be expected. Following are the most important items of criticism, divided into four groups:

1. Criticism of the effectiveness of behavior training:

- Very often, unrealistic (exaggerated) training goals are targeted.

- Most of the time, role plays are used that are out of touch with reality.

- Sometimes, the problems in the role plays are exaggerated and exercises with unrealistic problems take place.

- In behavior training, extremes are often overgeneralized.

- During behavior training, behavior is often enforced that would be punished in practice.

- Behavior conditioned by role plays does not remain stable in real life.

The effectiveness of role plays is criticized because often there is an insufficient or sometimes even a false relation to real life. Consequently, this creates a transfer problem. Scientific literature often refers to this problem, which is still not satisfactorily solved. Practical men and women do not appreciate it. Most of the time, the problem is evaded.

2. Criticism of the type of reinforcement

- The delayed reinforcement of behavior after the role plays lets us question the results.

- The use of video cameras to record the role plays makes the role players behave differently; they try to "show off", making the results questionable.

Based on the rules of the learning theory that immediate reinforcement supports the development of the required behavior, they do not differentiate between the short and long-term effect of a modification.

3. Criticism of the emotional demands during a role play:

• The uncritical use of behavior training and especially of the role play method puts the psychological and emotional health of the participants at risk.

• Role plays in front of an observing group (arena games) generate great frustration, followed by stress.

• After role plays, weakened participants often enter into a severe self-esteem crisis.

• The extreme psychophysiological stress leads to a partial mental block.

In this context, we certainly have to make a distinction on the participants' side. The psychological limit and the effect it has on them might be very different. There are hardly any systematically collected data for the criticism. These points of criticism are merely based on face validity.

4. Special points of criticism:

• The only goal of behavioral changes is to maximize productivity (Taylorism).

• The industry is short of qualified, well-educated trainers. The trainers often overestimate the bounds of their own capabilities and have an excessive self-portrayal.

A Study About The Acceptance Of Role Playing

A research study with a total of 1,014 managers and salespeople who had participated in role plays shows clearly that this training method meets with extensive disapproval. The most important reasons were:

• Role plays put a psychological strain on the participants, since most of the time they have to play in front of their colleagues.

• Most participants develop extreme mental blocks when asked to simulate sales talks in front of a camera.

• Role players view the criticism during the feedback phase as embarrassing.

The results of this research study about role play acceptance are described in detail on the following page.

Role Play Study

N = 1,014

No.		--	-	+	++
1	Role plays accurately reflect real-life situations.	83%	8%	9%	-
2	I feel an extraordinary amount of stress in role playing situations.	1%	1%	4%	94%
3	My behavior during role plays is almost the same as real-life situations.	91%	2%	7%	-
4	Performing in front of my colleagues doesn't bother me.	96%	1%	2%	1%
5	Being criticized after my role play is awkward and embarrassing.	2%	5%	5%	88%
6	I would like to see role plays used more often.	92%	8%	-	-
7	Little of what I learned in role plays could be of use in my daily work.	5%	7%	9%	79%
8	I enjoy participating in videotaped role plays.	97%	3%	-	-
9	I am <u>not</u> in favor of diminishing the information phase in order to increase the role play phase.	-	4%	11%	85%
10	Group role plays are more effective than team role plays.	87%	10%	3%	-

-- = I disagree - = I tend to disagree + = I tend to agree ++ = I agree

Contents

Role Playing For Competency Development

Role Playing In Perspective

Not too many years ago, the words role playing bore something of a mystical aura. The idea of having people act out how they would behave in different situations was thought to be too personal, too clinical for the classroom. Such methods had their place, perhaps, in the office of a psychiatrist or marriage counselor. But certainly not in training, where there is danger of a person being embarrassed or held up to ridicule in front of fellow workers.

Today there are very few companies that have not made use of role playing to train their salespeople, telephone receptionists, secretaries, customer service personnel, line supervisors, and managers at all levels. We have discovered that role playing is a most effective way to learn and that virtually every trainee can benefit significantly from it, both by watching and by taking turns as player. Moreover, we've discovered that you don't have to be a psychiatrist to conduct a role-playing session successfully. In fact, we've learned that the great majority of situations for which role plays have been written are not clinical at all. Rather, they are situations in which we are merely asking a trainee to perform the way we would like "in the real world". Putting it another way, role playing provides trainees with an opportunity to practice the skills that have been previously taught them and that are required in their work. Note that role playing is a practice session where trainees can try out the skills and procedures that they have previously been taught. It is precisely here that our use of role play in the workshop differs from the psychotherapist's or marriage counselor's use. They are primarily concerned with discovering behavior patterns and probing the depths of personality. Then, having made some tentative hypotheses about personality, they may ask the patient or counselee to engage in role play designed to have a therapeutic effect (for example, by reenacting some traumatic earlier event in the patient's life). Thus, the psychiatrist or counselor uses role play for two main reasons: diagnosis and therapy.

In contrast, in training we are primarily concerned with the trainee's ability to apply what was acquired earlier in the lesson ... that is, to bridge the gap between the lesson and its application in typical everyday situations. Textbooks on educational psychology devote much space to the concept of "transfer of training." Role playing is, without a doubt, one of the most effective teaching techniques for helping trainees to transfer their training by giving them chances to exercise new skills and develop behavior patterns (habits) that they will continue to practice in the "real world."

How iI All Got Started

Although our primary interest in role playing is as a training method, it's interesting to note that the first use of role playing in the United States was as a psychotherapy. Introduced by J. L. Moreno, an Austrian psychiatrist who came to the States in 1925, the technique was known as psychodrama (sometimes also referred to as "spontaneous" role playing). The person being treated was expected to act out aggressions, frustrations, inhibitions, etc., as a means of achieving catharsis (release) and of giving both therapist and patient an under- standing of the nature of the problem. Although Moreno's primary activity was as a therapist, he did make use of psychodrama in a training program that he conducted for R. H. Macy's Department Store in 1933. This is the first known use of role playing in the classroom in business and industry.

The present widespread acceptance of role playing as a tool for management development and supervisory training is largely attributable to the work of Norman R. F. Maier at the University of Michigan. His "new truck dilemma" and "old girls problem" are familiar to many professional trainers. Dr. Maier took role playing out of its psychiatric setting and shifted the emphasis to skills development in problem solving, human relations, and communications.

Spontaneous Versus Structured

Where Moreno's work relied on skilled therapists, Dr. Maier developed instructor guidelines and written roles that could be used effectively by the average instructor. Psychodrama is spontaneous; Dr. Maier's role plays are structured. The primary objective of psychodrama is diagnostic – to help participants gain insight into their own behavior, sensitivity to how they are perceived by others, recognition of the attitudes and assumptions that underlie their behavior, and so on. In contrast, the primary objective of structured role playing is to provide an opportunity for skills development (e.g., how to interview, solve problems, carry out procedures, give on-the-job training, etc.) and to identify and modify attitudes related to one's co-workers.

During the past two decades, the trend in management development and supervisory training is for the workshop to become a laboratory. Participants are encouraged to experiment and try out the new concepts and skills they are learning. Further, today's managers are much more willing to discuss their feelings, attitudes, assumptions, and perceptions of others. In short, role playing today is often a blend of the objectives and benefits of the two schools, spontaneous and structured. This is largely the result of a number of parallel developments, some of which are noted here:

Psychology in general and self-awareness in particular have become very popular subjects. The press, magazines (e.g., Psychology Today), and books (e.g., I'm Okay, You're Okay) have raised the level of understanding of the average person, and with it a willingness to discuss subjects that were once considered "off limits."

Encounter groups, sensitivity training, the work at Bethel and the National Training Laboratories, and the entrance of behavioral scientists into the ranks of management consultants have helped firms to recognize that effective interpersonal relations are essential to the smooth operation of the machinery of management.

New courses and disciplines in the applied behavioral sciences have been added to the curriculum of business schools (e.g., industrial sociology, organizational behavior, etc.). Further, the emergence of OD managers, MBO programs, and an emphasis on team building have all contributed to a heightened interest in the use of role playing.

The history of business and industry since the industrial revolution has been a gradual shift from Theory X management (appropriate in the days when mill hands worked 16-hour days) to a Theory Y style in which job satisfaction and personal development are essential to corporate success. This means that management at all levels must develop the skills needed to recognize frustration, boredom, and counterproductive behaviors.

The instructors in today's management development courses are much better prepared to fill the role of catalyst and change agent than were their counterparts a decade or so ago. They are more process-oriented, more aware that learning takes place not through lecturing on theories of motivation, but through arranging experiences that will give participants an opportunity to experience the consequences of their own actions.

Until recently, trainers had to rely on their own resources to develop course materials. Time and skill are required to write role plays, observer rating sheets, discussion guidelines, etc. This discouraged the use of the technique. Today, however, a wealth of material is available from publishers of training systems, and the instructor can select role plays that have been tested and revised to produce behavior change.

Best Of Both Worlds

As a result of the trends outlined on the preceding page, today's use of role play in the workshop combines the best of both worlds. Role assignments are structured in that they've been carefully written to create situations in which certain types of behavior are expected to emerge. The role play is then tested with a group of participants who are representative of the trainees for whom the roles were created.

Note that responsibility for a successful role play rests heavily on the writer's shoulders. If the role play does not elicit behavior along the lines intended, the writer must examine role assignments to see where error has occurred. Perhaps the writer forgot to give A some critical fact that was given to B... information that both A and B would know in the "real life" situation. Perhaps the writer included information that wasn't needed and that sidetracked the players by getting them off on a tangent. Perhaps an unconvincing role was created that participants had difficulty accepting and, therefore, enacting.

In short, it is the writer's responsibility to set the stage in such a way that the behavior patterns we are looking for will emerge naturally. Here is where stimulus/response psychology comes into play: the writer's job is to maintain stimulus control in setting the stage (writing the role) in such a way as to elicit correct responses. This is role play used for training, for behavior shaping purposes rather than for clinical or diagnostic purposes.

In this regard we might draw a parallel between the writing of role plays and of programmed instruction. In both cases the writer is responsible for structuring the information given to the learner. If the learner doesn't give the desired response, it is the writer's - not the learner's - fault, and the draft goes back to the writer for revision. This is often necessary for the novice preparing first role plays, and should be expected. Indeed, after using a role play in the workshop for the first time, you may want to invite your participants to discuss how it might have worked better, what additional information might have helped, what information was ambiguous, and so on. In short, the writer of role plays is trying to simulate the "real world" so that the player's behavior flows naturally out of the situation and is not contrived.

Note that we've been putting the "real world" in quotes. This phrase often comes up during the discussion of a role play when participants raise the old question of validity. They may feel that it is an artificial situation and that "in real life I would behave quite differently." The implication is always that they would behave correctly if they were interacting with their workers and did not have a bunch of colleagues looking on. The evidence does not support this objection. Research and field studies indicate that once the initial artificiality of the first half minute or so of a role play is past, the players tend to behave in much the same way as they would on the job.

Let's expand this "real world" aspect of role playing, for it is the central element in today's programs of action-oriented management development. Educational programs in public schools typically stress the acquisition of knowledge and skills, and the development of values appropriate to our society. In contrast, management education is more concerned with behavior change that leads to improved performance on the job.

In the training of first-line supervisors, for example, we would like the participants to assess their own style of supervision, which usually falls near one of the two ends of the continuum - autocratic or permissive. Thereafter, we want supervisors to practice a more catalytic style of supervision, determining how much pressure and how much interaction is appropriate to each of their workers. Although we can teach supervisors a great deal about personality types, styles of supervision, man's hierarchy of needs, and so on, this is not likely to change their behavior in significant ways. In short, the traditional, information-oriented programs of education and training do not give supervisors the opportunity to assess their own strengths and weaknesses and to practice new behavior.

Let's take another example. Suppose we want to develop in executives the ability to recognize and deal with the forces at work in a committee meeting. All the lectures and textbooks on such subjects as group dynamics and conference leadership will be of little avail unless learners are given an opportunity to run meetings and to experience the consequences of their attempts to apply this new knowledge.

Thus it is that role playing has taken a central place among the training techniques used in management development today. Like sensitivity training, case method, games and simulations, in-basket exercises, and other dynamic techniques of training, role playing is discovery-oriented learning. These techniques share a number of things in common. First, there is a greater degree of student control over the learning process. Second, learning is much more dependent on spontaneous student reaction to the learning environment. In fact, the instructors who conduct the role plays are primarily arrangers of experiences rather than dispensers of information, as are their traditional counterparts. Third, because the level of personal involvement by participants is high, we can focus discussion on attitudes and motivational forces that come to the surface during a role play and provide live material for discussion. Let's turn now to the dynamics at work in the process of changing human behavior, and apply these to the use of role play in the workshop.

Two Types Of Role Playing

At this point we should make a distinction between two major purposes to which role play can be put in the workshop: application and discovery. The first purpose, application, is present whenever we have previously taught learners how to perform certain functions or behave in certain situations, and then placed learners in role plays that are designed to give opportunities to apply what they have learned. The second purpose, discovery, is present whenever we use role play primarily to give the players an opportunity to gain insights into their own prejudices, mannerisms, and patterns of behavior.

Let's look at some examples of each type. The use of role playing in the training of salespeople is primarily an example of application rather than discovery. The sales manager will first instruct the new salesperson in such subjects as product knowledge, handling objections, listening for cues that reveal the prospect's needs, and closing the sale. Frequently these will be demonstrated by video or live presentation. Thereafter, role playing is used as a means of giving trainees the opportunity to apply the concepts, procedures, and skills previously taught them.

There are many other examples of this first type of role play. In the training of bank tellers, flight attendants, first-line supervisors, interviewers and counselors, teachers, telephone receptionists, and countless others, companies have made widespread use of role playing as a means of giving the trainees some "real-life experiences" within which they can apply the knowledge and skills previously acquired.

In the second type of role play that we have discussed, the trainees are not given prior instruction in how to behave. This would defeat our purpose, which is to give them the opportunity to discover for themselves the biases and assumptions upon which they operate in their dealings with others. This second use of role playing is perhaps more clinical, more introspective, more akin to the objectives of sensitivity training or group therapy than is our first use, application. Of course, there are degrees of involvement in using role play to produce insight and sensitivity. For example, in training salespeople, bank tellers, and flight attendants, we might wish to place the trainees in the role of a customer to enable them to discover what it's like to be in the other person's shoes.

In short, these two purposes–application and discovery–are not mutually exclusive. In fact, some element of discovery is present in every role play that is conducted effectively. Thus, it is not the presence or absence of self-discovery that distinguishes the two types of role play. Rather, it is the presence or absence of prior instruction that determines whether or not a role play is being used primarily as an opportunity for learners to apply their new knowledge and skills.

Let's look at another way to distinguish between these two types, or purposes, of role play. Psychologists are in general agreement that there are three basic ingredients common to any behavior change. These are: the acquisition of knowledge, the development of skills, and the modification of attitudes. Every teaching situation has these three elements. Let's look at each in turn.

Knowledge: The acquisition of knowledge consists of the learning of facts, concepts, principles, rules, and procedures, and the relationships among these (i.e., their implications or utility in solving problems and making decisions).

Skills: Here we are concerned with manual or manipulative skills (task-handling), cognitive skills (analytical and problem-handling), and interpersonal skills (people-handling). Common to all of these is the fact that to some persons these skills come naturally, having been learned almost unconsciously through imitation, whereas with others these skills must be acquired by first receiving instruction (knowledge) and then having the chance to apply this knowledge through practice.

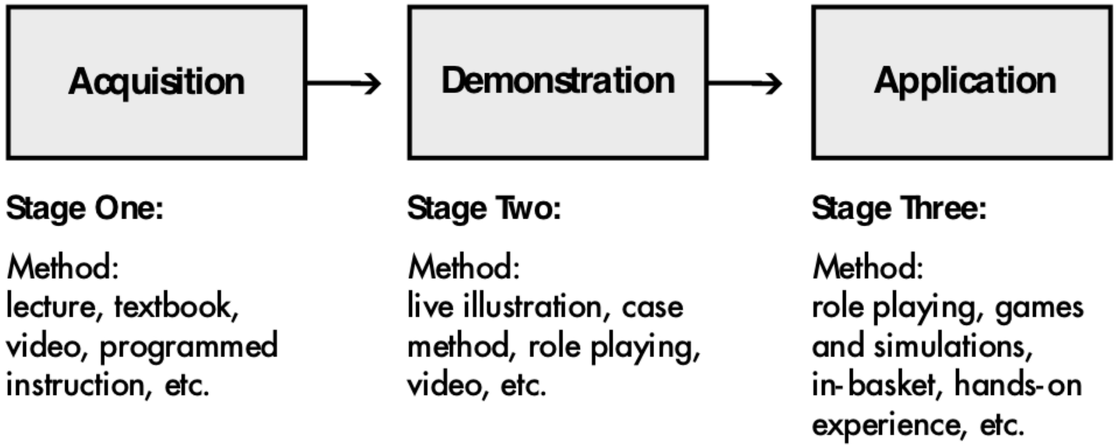
Attitudes: An attitude is a mental set that predisposes a person to interpret situations in certain ways and to act in certain ways. People have attitudes about virtually every situation or person with whom they come in contact. These attitudes strongly influence their behavior.

Given this admittedly simplified analysis of the elements present in any instructional setting, it should be apparent that our first type of role playing (learning by application) is primarily concerned with imparting knowledge and skills, whereas our second type of role playing (learning by discovery) is primarily concerned with the modification of attitudes. Again, we emphasize the word primarily, since all three elements (knowledge, skills, attitudes) are present in any teaching situation, and therefore the elements of application and discovery are both present in every role play.

Having examined the two objectives that can be present in any role play, we come to the conclusion that the element of discovery is always present and that it is the presence or absence of prior learning that determines whether a role play is being used primarily for application or for discovery. Where no prior instruction in "how to do it" is present, the purpose is generally that of discovery. A good example of this lies in the training of supervisors in companies that are hiring the "hard-core unemployed." Often the management of such companies wants to develop in their supervisors an awareness of their biases and assumptions regarding this new population of employees. Role playing thus becomes a useful technique for allowing these biases and assumptions to emerge, so that they can then be discussed. By discussing their assumptions and collective experiences, the supervisors can come to agreement on ways to deal effectively with the "hard-core unemployed" (incidentally, they usually discover in the process that the "hard core" are not as different from the present population of employees as they had imagined, and that the principles and procedures of effective supervision are universal and apply to all workers).

A Three-Stage Learning Model

Since more than 90% of the role play used in business and industry is primarily of the application type, the remainder of this trainer manual will be directed to instructors who plan to use role play mainly as an opportunity for their trainees to apply their new knowledge and skill. With this in mind, let's examine a three-stage learning model that places role play in its proper perspective in the total instructional process.



The first stage of virtually any new course of study is acquisition: the learner acquires new facts, skills, and attitudes. Thus, in the training of first-line supervisors, for example, it is at this stage that the learner is taught the different styles of supervision (autocratic, permissive, and catalytic), or Maslow's hierarchy of human needs (from physiological to self-fulfillment), or McGregor's Theory X and Theory Y, or Blake's management grid (task-oriented and people-oriented supervision). At this stage, these new concepts are little more than a new vocabulary of "buzz words," since learners do not yet know how they apply in the day-to-day situations within supervision. That is, they need the opportunity to see these new principles, concepts, skills, and procedures at work. And this moves us to the second stage in our learning model.

Every time learners acquire new knowledge and skills, they should be given an immediate opportunity for vicarious application. That is, they should see an example or illustration or situation that brings to life what they have just learned. Two elements should be present in any example: people and situations with which they can identify, and the new knowledge or skills that they have just acquired. Learning is vicarious because learners are not themselves caught up in the situation, and can therefore step back and view it more objectively. Thus, one reason for providing learners with this opportunity to apply vicariously what they have just learned is that they can be more objective by being less involved. If they were to go directly from our first stage (acquisition) to our third stage (application), we would, of course, lose some of this objectivity that comes from watching a third person perform, and giving a critique of his/her performance rather than our own. Putting it another way, when learners reach the third stage and must "do it themselves," they will be much better able to analyze their own strengths and weaknesses for having first done it for others whose performance they have observed.

We give learners this opportunity to observe others in action in a variety of ways. Every time we create an example or illustration, whether in text or lecture or video, we are doing so either to demonstrate to learners how they should do it correctly, or we are giving learners an opportunity to see a "real-life" example of someone else doing it... someone else whose performance they must then critique. It is during this critique that both learners and instructors receive feedback that indicates whether learners are ready to move on to the third stage of our learning model, application.

There is still another reason for giving learners the opportunity for vicarious application. If we throw them into the water before they are ready to swim, the threat of success or failure consumes much of their energy and often distracts them from applying the new knowledge and skills that they have recently acquired. In training a group of medical students, for example, we would not deliver a lecture on how to perform an appendectomy and then issue the surgical instruments to our students with instructions to go out and perform the operation. Rather, we would first demonstrate the operation, either by live viewing in a surgical amphitheater, or by video from an operating room where an appendectomy was being performed. Next, we would give the students an opportunity to perform the operation on a cadaver.

Next, they would perform the operation on a live patient, under close supervision. Finally, during their internship they would assist a number of surgeons in performing appendectomies. Only then are they considered fully prepared to operate on their own.

The same procedure applies in the training of first-line supervisors, salespersons, bank tellers, and so on. And yet, we have traditionally instructed supervisors by giving them lectures or books or videos that talk about Maslow, McGregor, Blake, etc., without any further opportunity for the supervisor to apply these concepts and skills in realistic day-to-day situations. By throwing supervisors into the water without giving them this opportunity, we are committing the same error that we would commit in asking first-year medical students to perform an appendectomy. To be sure, the consequences may not be a matter of life or death. Nevertheless, many employees can be bruised and many problems created by supervisors who either are not trained or whose training consisted only of the first stage of our learning model.

Before examining the third stage of our learning model, let's summarize the last few pages by listing the major reasons why learners must be given vicarious opportunity to apply their new learning:

- The knowledge, skills, and attitudes taught in the first stage of learning are often abstract; they must be illustrated with concrete, everyday examples or illustrations that bring them to life for learners.

- We want learners to be able to evaluate their own performance on the job. They can do so much more objectively for having first been given the opportunity to observe, analyze, and critique the performance of others.

- In discussing the strengths and weaknesses of another performer (presented by video or live demonstration), learners give feedback both to the instructor and to themselves. This feedback is useful in determining each learner's readiness to move on to the third stage of learning: personal application.

• When we omit the second stage of learning, learners are in the position of the medical student who must perform an appendectomy based on the lecture or text. The "transfer of training" gap is too great to bridge, with the result that errors and problems run high.

• Vicarious application gives learners self-confidence. Without it, the threat of success or failure consumes much of their energy and often distracts them from the main task of applying new knowledge and skills that they have recently acquired. Let's go on to the third stage of learning, application, which can be divided into two types of application:

(1) simulated experience, in which learners respond to "real-life" situations in the classroom through role playing, games and simulations, in-basket exercises, etc.; and

(2) actual experience on the job, where each learner's supervisor can pick up where formal courses leave off. If we turn back to the diagram illustrating our learning model, we see that role playing is listed under Stage Two (Demonstration) and Stage Three (Application). This is easy to explain... the experience of the learners is vicarious when they are watching a fellow trainee demonstrate, and personal when they are placed in one of the roles themselves.

The instructor's objective in providing hands-on opportunity for personal application is this: we want each learner to have the chance to practice new skills and have the benefit of critiques by fellow trainees and the instructor. This does not mean, of course, that every trainee must participate in every role play, or even be given a chance to role play in every session. It does mean, however, that every participant should ideally have whatever number of chances at role playing are seen as necessary, based on performance. Once learners have reached a performance level that indicates to the instructor, colleagues, and themselves that they are ready to apply their new knowledge and skills correctly on the job, the workshop side of our third stage (application) is complete, and learning then continues in the context of the daily situations that are now the trainees' “learning laboratory” for the rest of their lives.

Selecting Or Writing Role Plays

Since our primary concern with role plays is their use in providing learners with an opportunity to apply the skills that they have previously acquired, it follows that the process of selecting a given role play for workshop use will be based largely on its effectiveness in eliciting the skills that learners have already been taught. In this regard, role plays can be compared with programmed instruction in that both should be field-tested to assure that they are effective in producing the desired behavior. It is not uncommon for the writer of a role play to expect directions to the players to focus on a particular issue, only to discover later in actual use that the players concentrated on another issue – a minor detail that the writer included only to give reality to the assignment – and missed the main point altogether. If the writer uses the role play in subsequent sessions with other trainees and discovers the same situation to be true, it is clear evidence that revision is necessary.

The writing of effective role plays is not an easy task, and instructors should first examine what has been published and use existing material wherever possible. This is not always feasible, however... especially if you are teaching procedures that are unique to your organization. Role plays designed to develop skills that relate to your organization's policies and procedures must be written by the instructor, since published material is not likely to be available.

In doing this, the "critical incident" technique is often helpful. Let's illustrate this with an example. Suppose that you are responsible for training the sales managers in your organization. Periodically you bring them together for training and for briefings on new policy, changes in the product line, and so on. At these training meetings you would like to use role play to help them develop skills in supervising their salespeople. You could, of course, sit down and write several role plays dealing with different aspects of the sales manager's relationship with the company's salespeople, but you frankly have not been in touch with field operations for several years and are quick to admit that you don't really know the kinds of day-to-day problems that your sales managers are encountering. How do you find this out? By asking them, using the "critical incident" technique as your means of gathering data.

A sample is shown on the next page.

Role Play Sample

Memo to: Regional Sales Managers

From: Director of Sales Training

Subject: Preparation for Sales Meeting on November 27

To help us prepare for our meeting next month, I would like you to recall the events of the last few months and select one incident that occurred between you and one of your salespeople that you feel is unusual and that taught you a lesson (either a "how-to-do-it" success story, or a "how-not-to-do-it" failure story). The incident you select may be used to develop a case history or role play for our forthcoming meeting; all names will be changed.

You will probably need several paragraphs to describe the incident or series of incidents. Please indicate what made the situation "critical." That is, describe what it was that made this situation different from the usual, and what you learned from it.

Please have this back to me by November 15.

From the responses you receive you will be able to identify the kinds of problems or situations that are on the minds of your sales managers, and their relative effectiveness in dealing with these situations. Armed with these data, you should be able to prepare realistic role plays for your meeting.

Another advantage to the critical incident technique is that there will probably be greater interest and ego involvement by your trainees at the November 27 meeting because they have previously given some thought to the problems that you are dealing with in the role plays you have created.

As a simplified model of a role-play assignment, we might consider a picture puzzle. The picture is usually printed on the cover of the box, so that pieces can be laid out in their approximate positions. In role playing, each player has some of the pieces required to construct the entire picture. Neither can do it alone. Each must interact with the other, finding out what pieces the other person has, and working together to construct the picture. The observers are usually given both assignments. By equipping them with "the picture on the puzzle-box cover," we enable them to analyze how effective the players are in putting their pieces together and emerging with the correct picture. (And here the analogy breaks down, for in role playing there is often no single "correct picture," but rather a number of acceptable solutions, or appropriate courses of action.)

In writing role plays, your job is to set the stage rather than to prepare the script. Role playing is not a theatrical exercise for trainees to show their dramatic talent. Rather, our objective is for the players to be themselves and to "act naturally." This means, for one thing, that the situations you create must be realistic. That is, the situation you describe in the assignment that goes to each player must lie well within his/her framework of experience as "something that has happened or might easily happen."

Wherever possible, you should avoid telling a player how to act during a role play. For example, suppose we are teaching customer courtesy to bank tellers, and are creating role-play assignments for the teller and the customer. It would not be appropriate to tell the customer to "be angry" or to tell the teller that "Mrs. Smith is a very finicky customer who has made you angry on previous occasions." Instead, your job is to set the stage in such a way that the opportunity for anger is strongly present. You might, for example, tell the customer that "you have been waiting in line for ten minutes, during which other persons who arrived at the bank long after you did have already been taken care of at the other teller windows."

A role play is successful to the degree to which it promotes interaction between the two players. One of the shortcomings of role-play assignments prepared by a novice writer is that they "let the players off easily"... that is, the players can reach a mutually satisfactory solution with a minimum of interaction. Often this is the result of giving one of the players most of the pieces of the puzzle, so that very little interaction is needed to get the remaining pieces from the other player.

In some types of training, you want the role play to provide the learners with an opportunity to practice their skills in dealing with a variety of problems. An example is the teaching of selling skills, where we might want the salesperson to have a chance to deal with a number of common objections. In writing the customer's or prospect's role, we might arm them with three or four objections. Thus, the customer's role might contain something like this:

"On the one hand, you like what you've heard about XYZ, the new salesperson's company, and its line. However, you've always gotten good service from ABC, whom you have dealt with for some time now. It wouldn't be fair to them. And, though XYZ is offering you a better price, you're familiar with that old trick... once they make the sale, the price would be right up there with ABC's price. As for XYZ's service contract, you've heard that it is better than ABC's. However, ABC has given you prompt service whenever you needed it – without contract. And their charges for service calls have been less, you suspect, than XYZ's charge for the service contract."

As can be seen in the above contract, the salesperson is likely to encounter three objections during the sales presentation: loyalty to present vendor, price, and no need for service contract. This will make the interaction much more meaty and realistic.

Preparing The Class

When you are administering role play with a group that is new to the technique, you should begin the role play session with a discussion of what role playing is, as used in the training context. During this discussion, be sure that therapeutic role playing is contrasted with role play as used for training. Be sure, also, to point out the difference between "acting" and role playing. An actor's efforts are aimed primarily toward making an impact on the audience; role play participants direct their efforts to themselves, concentrating on applying the skills they have learned and are developing.

Often trainees new to role play will object to it on the grounds that it is an artificial situation calling forth behavior that would not actually occur in real life. Should this objection arise, be sure to bring out the points made earlier.

Before assigning parts and distributing role plays, you must make sure that the members of the group are in agreement on what constitutes appropriate and inappropriate behavior in the kinds of situations that will be role-played. For example, suppose you are teaching a group of managers how to conduct a performance review, or appraisal interview. Before assigning roles, you should review with the class the procedure and the skills involved. Included under "Procedure" would be such things as: establish the need for joint performance appraisal, get the employees to evaluate their own performance against each of the responsibilities, compare your rating with theirs on those responsibilities on which you agree, do the same on those items on which you disagree, resolve differences where appropriate, come to join agreement on the action that each of you will take in the months ahead.

This is the procedural side of the performance review; now let's look at the skills side. Included under "Skills" would be such things as the ability of the managers to establish a friendly climate of mutual acceptance and benefit, their ability to probe for additional information, their skill in getting the employees to do most of the talking, their ability to lead the employees to discover their strengths and weaknesses for themselves, their skill as effective listeners (e.g., in hearing what is not said, in picking up and pursuing cues that reveal the employee's true feelings, etc.).

Selecting The Role Play Participants

When you are using role play for the first time, or if you are using it as a demonstration during the vicarious application stage of learning, you should pay special attention to selecting the role play participants. Your objective in these cases is to "turn the group on" to role playing or to demonstrate the proper application of knowledge and skills. Therefore, you would do best to select the players following these guidelines:

Select players who are generally well-liked by the other members of the group. In this way you will minimize the possibility of distracting the group's attention from the purpose of the role play as a demonstration, and misplacing it instead on any personality differences that might be present.

By selecting well-liked and confident players you will also facilitate the observers' identification with the players; we all identify more easily with someone whom we like. The greater the depth of identification the observers experience, the better will the vicarious application stage of the learning model succeed.

It's also important to select players who you know will perform well for this first, or demonstration, role play. Once the observers have had a chance to see a role play well done, they will be more likely to welcome their turn at role playing and to do well themselves.

Conducting The Role Play

Once the participants have learned what role playing is, and they have discussed the skills that they will be evaluating during the role play (preferably, they have formulated a rating sheet or checklist), you are ready to begin the actual role play.

The first step is to select the two players, giving each only the copy of his/her role. Make sure you have given the correct role (e.g., boss/subordinate, salesperson/customer) to each player and haven't mixed them).

Instruct the players not to compare their roles, as this would destroy the spontaneity of the role play. Ask them then to step outside the room to study their roles, reminding them that they should neither compare their roles nor discuss how they will perform before you call them to return.

Once the players are out of the room, distribute a copy of the sheet containing both role plays, along with the rating sheet (if you are using one). After everyone has read both roles, open a brief discussion on what problem is presented by the role play. Allow no more than five minutes for the reading and discussion, and instruct the observers to use their rating sheet (or to keep the questions on it in mind) as they watch the role play.

Then set any stage that the role play requires (table and chair, for example), if you have not done this before the meeting, and call the players in. Have them take their places and begin the role play.

The role play should last for about five or ten minutes, depending on the fruitfulness of the interaction. For example, if the role play gets off to a slow start, but a solution appears near after ten minutes, it would be wise to allow the players to reach the solution rather than to stop the role play because of time. On the other hand, a role play that wanders on unproductively for ten minutes would best be terminated.

The players should stay in character throughout the role play. If they break out of character, by addressing a question to you, for example, instruct them to refrain from doing so and instead to concentrate their attention on reaching a solution to the problem within the context of the roles assigned to them.

When the role play ends, or when you decide that it should be terminated, have the players take their seats. The group is now ready for the follow-up discussion.