

Telling Tales of Transformation: Towards a Prescriptive Framework for Storytelling to Engage Stakeholders with Advanced Services

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Abstract

This paper presents a framework for the use of storytelling to accelerate the engagement of various stakeholders with organizational transformation. Though storytelling is associated with organizational change, and research into organizational storytelling is extensive, it has yet to be adapted into a method for the practicing storyteller. To fill this knowledge gap, a review of the literature is conducted, which informs a framework for organizational storytelling adopting the practitioner's lens. This has been used in workshops with senior executives from large, small and medium-sized enterprises, who have expressed the need for stories to engage stakeholders with advanced services.

Keywords: Storytelling, Organizational Change, Servitization

Introduction

Organizational transformation is a recognised managerial problem that is regularly explored in the research literature. The complexities, uncertainties, and risks of change processes concern a range of stakeholders in different ways. Organizational storytelling is a subject that has some significant potential in this area.

Since the 1970s, storytelling has been associated with organizational culture and change, and continues to be used as a tool to study change processes. Indeed, the assumed benefits of storytelling in manufacturing contexts were applied in *The Goal* (Goldratt and Cox, 1984), a textbook on OPT principles, presented as a novel. Yet, methods for

managers to use stories in transformation are scarce, and rarely refer to the research. This paper begins to fill this knowledge gap.

To do so, the following research questions have been employed:

- What are the emergent themes in the organizational storytelling literature?
- What is the relevance of this research from the practicing storyteller's perspective?
- Can a practical framework for organizational storytelling be developed, informed by this research?

The remainder of the paper is structured around these investigations, followed by a discussion of the application of a practical toolkit to teach senior executives from large, medium and small manufacturing enterprises. The context of this application is organizations predominantly from the manufacturing sector undergoing transformation towards advanced services. In our work, we have identified that engaging stakeholders with the complexities of servitization is a common problem amongst our industrial collaborators. Our motivation for investigating storytelling as a potential tool for our collaborators was based upon initial investigations into the value of storytelling as a method of engaging stakeholders with complex organizational phenomena.

Literature Review

Two notable reviews of the organizational storytelling literature by Boyce (1996) and Vaara et al. (2016) have guided the selection criteria of this paper's review. However, these papers do not propose methods of organizational storytelling as part of the research agenda, as scholarly works tend to focus upon how stories are used in organizations, rather than how they could be used effectively. Therefore, the present study revisits many of the papers identified in these reviews, while attempting to adopt the lens of the practitioner engaging stakeholders.

Overview of Organizational Storytelling

One of the earliest studies to expose the phenomena of using stories in organizations was by Clark (1972), who discusses organizational 'sagas'. The saga is defined as a narrative of heroic exploits and events, which shapes the identity of an organization and its members, and instils pride in its stakeholders. This is achieved through a combination of the rational and the dramatic, which guides how stakeholders should act in relation to the organization while emotionally engaging them in the process.

The saga was in turn explored as the 'epic myth' of organizations by Mitroff and Kilmann (1975). This was an early paper that proposed storytelling should be taken seriously in management research; and that the epic myths of organizations provide evidence for doing so. Epic myths serve multiple functions in organizations. At one level, they exaggerate the adversities faced and triumphs accomplished by individuals, elevating said individuals in the perceptions of stakeholders. At a higher level, it is argued that each organization has a 'central' epic myth that is infused into all levels of policy and decision making (Feldman, 1990), providing legitimacy to the continuance of practices that have worked well in the past (Boje et al., 1982). This central myth emphasises the unique qualities of the organization (Boyce, 1996; James and Minnis, 2004; Taylor et al., 2002) which, paradoxically, employs a mythic form similar to those used in other organizations (Martin et al., 1983). In their study, they found that such myths served to help managers describe ideal rather than actual experiences in organizations, unless actual experiences could be used as examples to justify ideals. In this way, myths served as problem solving, communication and engagement tools for managers Mitroff and Kilmann (1975).

As research into this area developed, storytelling was more closely associated with the culture of organisations. Pettigrew (1979) provided a framework for comprehending organizational culture using symbols, rituals, and myths. Pettigrew argues that implicit definitions of myth undermine their potential value as research tools. Citing the work of Cohen (1969), Pettigrew shows that the term 'myth' tends to be pejoratively used to infer that something is not true. However, myths are useful in that they "contain a narrative of events often with a sacred quality which explores in dramatic form issues of origin and transformation. In so doing they anchor the present in the past, offer explanations and, therefore, legitimacy for social practices and contain levels of meaning that deal simultaneously with the socially and psychologically significant in any culture" (Pettigrew, 1979, p. 576).

Boje et al. (1982) built upon this work, arguing that myths are circulated at all levels of organizations, and along with language, symbols and metaphors, form organizational culture. This is because myths both explain why organizational systems are in place and describe how they work; 'bounding' actors to an organization by rationalising their activities in relation to it. True stories of prior acts can attain a mythic quality, providing a 'blueprint' teaching people about what worked well in the past for continuity as well as what could happen in the future (Boje, 1989). Pettigrew (1979) was one of the first to argue that myths are fundamental to organizational change (Feldman, 1990), which Boje et al. concur. However, while myths can project organizational futures, groups within organizations can also have their own competing myths. The dominant myth of an organization reflects the outcomes of power negotiations amongst individual actors or groups, and once an organizational myth is established, it is highly resistant to change (Boje et al., 1982).

Brown (1994) subsequently demonstrated how accomplished myth-makers can exploit established symbols and myths in organizations to create futures that suit their own political agendas. Myths make the complexity of organizational processes and values accessible to stakeholders in a memorable way, and are therefore influential on decision-making. By creating an alternative myth based on an established, overarching myth, storytellers can effectively manipulate their peers to make decisions that prioritize the storyteller over the organization. Brown (1994)'s case illustrated that this is achieved through a combination of 'procedural rationality' and the controlled flow of information to undermine any existing 'facts' that do not support the storyteller's agenda. It is argued that the symbolic significance of myths make them particularly effective at being remembered and transmitted, and are therefore particularly useful as tools of manipulation (Brown, 1998).

The obfuscating complexity of organizations give rise to such opportunities, not only to create myths, but to revise, reframe and reinterpret established myths. Boje (1995) discussed this in the context of Disney and uses the play *Tamara* as a metaphor for the storytelling organization. *Tamara* was unlike traditional plays in that it was performed in a large mansion rather than on a stage, and members of the audience experienced the story by following characters as they moved around the house. The performances of individual actors occurred simultaneously as they moved to different locations, and it was impossible to experience the play from every character's perspective. Boje argued that this reflected the 'plurivocal' nature of organizational stories. As he states: "At one extreme, the storytelling organization can oppress by subordinating everyone and collapsing everything to one "grand narrative" or "grand story." At the other extreme, the storytelling organization can be a pluralistic construction of a multiplicity of stories, storytellers, and story performance events that are like *Tamara* but are realized differently depending upon the stories in which one is participating" (Boje, 1995, p. 1000). In the

case of Disney, Boje (1995) argued that not only is the official story, or grand narrative, not consistent with the stories of various stakeholders, but that *The Disney Story* itself has been ‘remythologized’ (McWhinney and Batista, 1988) over time and in different contexts to suit the requirements and objectives of key stakeholders. Therefore, organizational myths are complicated amalgamations of the various perspectives of stakeholders both in the telling and interpreting of stories. The acceptance of stories depends upon the level at which they are aimed (macro or micro), the roles of storytellers, their associated powers, and their skills at balancing between the novel and the established in the processes of remythologizing and myth making.

When engaging stakeholders with stories, the impact is evident when the tangible outcomes are consistent with the myth. ‘Performativity’ is a term attributed to this process (Czarniawska-Joerges and Jacobsson, 1995; Garud et al., 2014, 2017; Vaara et al., 2016). This is where symbolic myth making acts, such as political speeches, can result in outcomes that are equivalent to physical acts (Czarniawska-Joerges and Jacobsson, 1995). This is facilitated by the positive psychological effects of change narratives that use examples of possibilities, such as what other organizations have accomplished, to motivate audiences (Pentland, 1999). Dobosz-Bourne and Kostera (2007) argue that elevating these narratives through mythic attributes can enhance these effects due to their symbolic association with the spiritual and sacred. However, it is also argued that the harmful effects of change narratives not coming to fruition can also be heightened if they employ mythic attributes, as the spiritual side of the human psyche is relatively vulnerable (Dobosz-Bourne and Kostera, 2007). Therefore, the inherent ambiguity and abstraction of myths (depending upon the level in the organization in which they are used) can leave gaps for audiences to create positive meanings themselves and for storytellers to remythologize stories as events progress (Boyce, 1996; Schedlitzki et al., 2015; Vaara et al., 2016; Weick and Browning, 1986) to counter the potential harmful of effects of the myth being perceived as untrue.

Thematic Analysis

From the literature it is evident that the genre of story most often associated with organizational culture, transformation and change is the myth. Though there are archetypal elements specific to myths, a thematic analysis of the extant literature reveals broad categories that can be associated with organizational storytelling: Context, Roles, Content and Performance. The interrelationship of these categories is illustrated in Figure 1.

Context

The context is a collective term that refers to the circumstances, at various levels, in which a story is both set and told, combined with the reason for the story. The levels at which the story or myth relate can be at the societal (Baskin, 2005), organizational (macro) or individual (micro) level (Arnaud et al., 2016; Boje, 1989; Sköldbberg, 1994; Taylor et al., 2002). From the practitioner’s perspective, we posit that the definition of the context can be as specific as the environment where the story is being delivered and the media through which the story is told (Denning, 2006; Vaara et al., 2016). Stories have been associated with a strong sense of purpose from the outset of research into organizational storytelling at the levels of the organization (Boyce, 1996; Clark, 1972; Pettigrew, 1979; Wilkins, 1984), and of groups and individual storytellers (Brown, 1994; Denning, 2006; Gartner, 2007; Vaara et al., 2016). At a high level, for instance, the broad context of ‘organisational change’ can be both the circumstances and objective of storytelling (Balogun et al., 2015; Solouki, 2017).

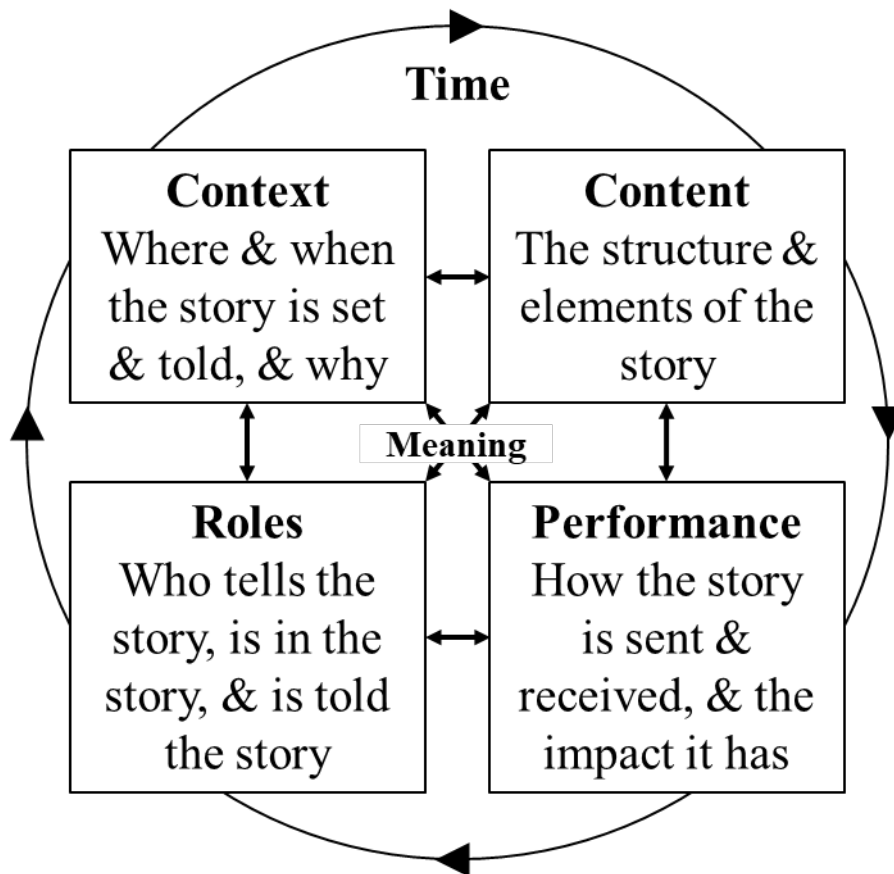


Figure 1 – Framework for Organizational Storytelling from a Practitioner’s Perspective

At the level of the story itself, the context can also relate to the story’s ‘setting’ at the beginning, and how this compares or contrasts with the end state (Morgan and Dennehy, 1997; Pentland, 1999). The context of the story could relate to a past state, e.g. when the organization started (Clark, 1972), or how the high level myth of the organization came into being (Boje et al., 1982). It is argued that stories using prior contexts to compare and/or contrast with the present and/or future contexts are persuasive tools that engage stakeholders with the organization’s or storyteller’s purpose (Dalpiaz and Di Stefano, 2018; Mitroff and Kilmann, 1975; Pettigrew, 1979; Vaara et al., 2016).

Roles

Different people within an organisation have different roles within a context, and have had, or will have, different roles to play in the unfolding narrative (Boje, 1989, 1991a; Sköldberg, 1994; Vaara et al., 2016). The literature uses different terminology to refer to roles, such as ‘actors’ (Boje et al., 1982; Brown, 1994; Dalpiaz and Di Stefano, 2018; Maclean et al., 2012; Schedlitzki et al., 2015; Vaara et al., 2016) or ‘agents’ (Arnaud et al., 2016; Balogun et al., 2015; Sköldberg, 1994). Different roles within organisations tell different stories to make sense of strategic and organisational processes, and these stories have been used to study these processes (Balogun et al., 2015; Fenton and Langley, 2011). Research has also explored the use of storytelling to engage different roles in change processes (Denning, 2006; Garud et al., 2014). This research argues the importance of using stories that are targeted to different roles within organisations and help audiences identify with the agenda of the storyteller.

Content

It is important to recognise the emphasis on different types of content in stories depending upon the different approaches to organisational storytelling. Early research quickly identified that different categories of story exist within organisational settings (Martin et al., 1983), which have evolved to include a broad range of objectives (Denning, 2006). Most of the research explores the themes of stories based on their content, and assigns these stories to genres such as the myth. Frameworks exist that prescribe ‘good’ story content based on historical principles (Boje, 1991b; Morgan and Dennehy, 1997), though these have yet to be aligned with the research literature. As discussed, the genre of story most often associated with organizational storytelling is the myth, and the archetypal attributes of this genre are discussed throughout the literature to various extents.

Performance

Performance represents the channels through which stories are delivered and received. Various terms are used in the literature that relate to performance, such as ‘rhetoric’ to describe how a story can be delivered (Feldman et al., 2004; Marja Flory and Oriol Iglesias, 2010; Sharma and Grant, 2011) and ‘performativity’ to describe what and how a story delivers (Czarniawska-Joerges and Jacobsson, 1995; Garud et al., 2017; Vaara et al., 2016). Informed by this literature, we exploit the definitions of performance to represent both how a story is performed and how it performs, i.e. how the impact of the story compares with its objective following its presentation. Performance can engage various stakeholders in transformation processes, and depends heavily upon the role of the storyteller and the role(s) within the audience (Buchanan and Dawson, 2007; Garud et al., 2017; Wendelin Küpers et al., 2013).

Boje (1991a) argues that performance and content are two sides of the same coin, and therefore performance is a vital consideration in organizational storytelling. This definition of performance refers to the interactions between the storyteller and audience, and how the meaning of the story is created through this interaction. The onus here is on the value of these performances, and how they provide insight into the dynamics of organizations and their members. However, other than brief acknowledgements of the importance of body language (Boje, 1991b; Denning, 2006), and technology (Brown and Thompson, 2013; Vaara et al., 2016), there is little in the literature to support the practicing storyteller.

Meaning and Time

Additionally, meaning and time are regularly discussed in the literature. For the purposes of our framework, it is important to note that stories are temporal media, and their meaning can change over time as events unfold and different stakeholders are involved in their retelling (Boje, 1991a; Dailey and Browning, 2014). From a practitioner’s perspective, the storyteller should therefore maintain his or her awareness of the unfolding events having presented the original story, to ensure that the story is progressing according to plan, or if the story needs to be revised to accommodate unforeseen deviations or misinterpretations amongst stakeholders (Balogun et al., 2015).

The Hero’s Journey

Figure 1 illustrates what we deduce is of concern to the practitioner of organizational storytelling, based upon our research. To successfully practice storytelling, the practitioner must understand the interrelationship between the context, roles, content and performance of organizational stories, and be mindful of the impact time will have upon the meaning of stories. From our findings, there is a relative dearth of methods that the practicing manager can use to negotiate this relationship. However, we can also deduce

that methods do exist that can be aligned with our framework to help the practitioner. To this end, we refer to the Hero's Journey.

The Hero's Journey is a classic mythic story structure based on the work of Joseph Campbell and the theory of the monomyth (Campbell, 2012; Vogler, 2007). This work argues that all mythology follows the same basic structure of a hero embarking on a quest, which takes them from their ordinary world into a special world. Here, they encounter many characters and face different challenges, leading to the main ordeal in their quest. On the road back home, the hero faces additional challenges, where the special knowledge or skills obtained during the quest are applied, thus changing both the hero and his or her normal world forever (Vogler, 2007).

Table 1 shows how the Hero's Journey has been adapted into 12 steps for writers (Vogler, 2007) and how these steps can be mapped against an equivalent journey for stakeholders undergoing organizational transformation. In our analysis of the research literature, we note that the generic attributes associated with organizational myths share similar traits to the Hero's Journey. We also note similarities between the Hero's Journey and processes of organizational change. For instance, the three stages of mechanisms in innovation narratives promoting coordination across innovation processes (Bartel and Garud, 2008) take stakeholders through a similar journey of introducing innovations (ordinary world), commercializing them through problem definition and solving (special world), and embedding the innovations as part of the organizations new processes. (the road back). This provides evidence of the journey's suitability for transformation narratives.

Table 1 – The Hero's Journey (Vogler, 2007) mapped against an equivalent journey for Stakeholders undergoing organizational transformation

<i>The Hero's Journey</i>	<i>The Stakeholder's Journey</i>
Act One	Normal Situation
Ordinary World	Business as usual (Macro Context)
Call to Adventure	Introduction of Objective (Micro Context & Stakeholder's role as Hero)
Refusal of the Call	Reasons for Stakeholder's reluctance
	Stakeholder's First Steps
Meeting with the Mentor	Storyteller (Mentor) helps Stakeholder overcome their reluctance
Crossing the First Threshold	Stakeholder's demonstration of commitment
Act Two	
Tests, Allies, Enemies	Other roles involved (Allies and Enemies) and potential issues (tasks)
	Short-term Objective
Approach to the Innermost Cave	Preparing for the Objective (different roles involved)
Ordeal	Objective being met
Reward	Immediate Outcomes (impact upon Micro context)
Act Three	Long-term Outcomes
The Road Back	Relevance to Stakeholder longer term
Resurrection	Long-term challenges (impact on Macro context)
Return with the Elixir	Long-term benefits (Macro & Micro level benefits)

The process of adapting this journey involves aligning its steps with our framework. The steps in the journey relate to the content of the story specifically. In our approach, the hero's quest, or ordeal, represents the storyteller's objective, while the hero represents the stakeholder. The narrative created guides the stakeholder through their initial reluctance, through the process of overcoming the objective, and the long-term benefits to the stakeholder and his or her organization. The interrelationship between the context, roles and content are reflected in the elements of the journey. For instance, we assign the storyteller to the role of 'mentor', who guides the stakeholder into their role as hero. We also encourage the identification of different roles in the change process and their identification as 'allies' or 'enemies' in relation to the tasks the stakeholder must complete. We argue that this framework for developing story content can assign various roles as heroes, and note that the assignment of allies and enemies will depend upon the stakeholder's specific context.

In terms of the context, we adapt the different steps in the Hero's Journey to relate to different levels of the context from macro to micro. The stakeholder's 'ordinary world' at the outset of the journey would relate to both the macro and micro context of the stakeholder, as would the final act. To create relevant story content, the practitioner must relate the micro content (stakeholder achieving the objective) with the macro context (long-term impact on stakeholder's organization). This is achieved through the dramatic structure of the Hero's Journey in the middle, where the storyteller demonstrates an understanding of the challenges and why they are of interest and benefit to the stakeholder.

Application

The stakeholder's journey depicted in Table 1 has been adapted into a toolkit that has been used with executives from large and small enterprises in manufacturing and software companies pursuing advanced services. As discussed above, one of the benefits of storytelling is that it is a tool for both conveying and making sense of complex transformation processes, which are associated with servitization (Baines et al., 2017). Furthermore, overcoming the production-oriented mindset is a common barrier to the pursuit of services (Burton et al., 2017; Martinez et al., 2010), which the persuasiveness of stories can be used to overcome. While stories have been used as a research tool in servitization contexts (Xing et al., 2017) they have yet to be explored as a method for practitioners. The framework described in this paper is designed to fill this knowledge gap.

The workshop takes participants through definitions of the context, roles and content of the story, using the elements defined in Table 1. While the stories created can have various timeframes, we encourage participants to focus upon specific, short-term objectives. Additionally, rather than focus upon a high level, we ask participants to focus upon the micro levels of the context and roles, i.e. an individual or small business unit in the target organization. The tool has generated significant interest from participants, who use the framework not only to create engaging story content, but also as a problem-solving tool for strategizing their next move. In some cases, for instance, participants have decided that they have been focussing on the wrong stakeholders; a realization that emerges while using the storytelling tool.

Conclusion

We have introduced a framework for organizational storytelling based upon the extant literature, attempting to adopt the practitioner's lens. This has informed a toolkit to generate story content based on the Hero's Journey. The toolkit shows promise at this

early stage at a strategic and problem-solving tool, but does not take into account the performance of stories, which will have a significant impact on content. Further work will refine this toolkit, obtain data related to the generation of story content, and balance this with the performance of stories.

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