

# The Effectiveness of Strategy Tools

## Narrative Facilitation of Strategy Implementation Workshops

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*Document Version*  
Accepted author manuscript

*Published in:*  
Action Research

*DOI:*  
[10.1177/1476750318786784](https://doi.org/10.1177/1476750318786784)

*Publication date:*  
2021

*License*  
Unspecified

*Citation for published version (APA):*  
Kryger, A., & Edwards, K. (2021). The Effectiveness of Strategy Tools: Narrative Facilitation of Strategy Implementation Workshops . *Action Research*, 19(2), 338-355. <https://doi.org/10.1177/1476750318786784>

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Download date: 16. Sep. 2021



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Journal article (Accepted manuscript\*)

**Please cite this article as:**

Kryger, A., & Edwards, K. (2018). The Effectiveness of Strategy Tools: Narrative Facilitation of Strategy Implementation Workshops . Action Research. DOI: 10.1177/1476750318786784

DOI: <https://doi.org/10.1177/1476750318786784>

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\* This version of the article has been accepted for publication and undergone full peer review but has not been through the copyediting, typesetting, pagination and proofreading process, which may lead to differences between this version and the publisher's final version AKA Version of Record.

Uploaded to [CBS Research Portal](#): June 2019

## **The effectiveness of strategy tools: narrative facilitation of strategy implementation workshops**

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### **Abstract**

This study is an attempt to meet a general challenge facing a strategy consultant's choice of tool: 'how do you know your tool works?'. This question is inherently difficult to answer and in this single company multiple case study, we test narrative facilitation of strategy workshops that aimed at implementing strategy and propose a method for measuring its effectiveness. We used a Mann-Whitney U-test to statistically compare the effectiveness of facilitating workshops with and without interview technique from narrative therapy. The study shows that an empirical comparison of the effectiveness of narrative facilitation technique can be made statistically through a Mann-Whitney U-test when part of the workshop data, e.g. employees' self-evaluation of possible actions' impact on strategy, can be numerically evaluated. The study also gives valuable insight in how an effective facilitation technique can be empirically condensed through expert reviews and sorting and naming exercises resulting in a prescriptive guide to effective facilitation of strategy implementation workshops and thus adds empirical detail to the ongoing discussion of measurement methods in action research design.

### **Purpose**

The purpose of this paper is to meet a general challenge facing strategy consultants: 'how do you know your tool works? This question is inherently difficult to answer because using one tool (e.g. a workshop) naturally excludes the use of another and thus a comparison. While such comparisons are essential for furthering the field of strategy consulting, they have been the subject of little empirical research. We empirically explore this challenge through the case of 12 strategy implementation workshops at a diesel engine company. The purpose of the workshops was to solve problems indicated in a recent employee survey while ensuring that the resulting actions were aligned with the new strategy. The specific challenge for the strategy consultants in this case was to mobilize the tacit knowledge of a workforce that was highly segmented into several different specializations and that had no common language for articulating shared problems. The strategy implementation workshops at the diesel engine company provided the empirical setting for the research question: how can the effectiveness of a facilitation technique for a strategy implementation workshop be assessed and how can an effective facilitation technique be presented in a short, standardized form to guide strategy consultants?

In this study, we use the workshop participants' self-evaluation of the strategic impact of the actions they formulated during the workshops to assess the effectiveness of the workshop: high relative impact on strategy was used as an indicator of effectiveness in a strategy implementation context. We combine a qualitative case study with elements of a field experiment for a mixed methods approach, and we present a step-by-step guide to effectively facilitating strategy implementation workshops. We also construct an interview guide based on the effective facilitation technique that can be used in workshops by a group of people such as departments or project teams for structured problem solving and strategy alignment when an experienced facilitator cannot be present at the workshop, thus mirroring a basic condition for many organizations. By providing a prescriptive facilitation guide, we accommodate managers' and strategy consultants' need for scalable strategy tools: they cannot only work in the presence of an experienced facilitator; they should also work in their own right. Further, we sought to bolster the generalizability of the effective facilitation technique by subjecting it to review by external strategy consultants and by validating it using labeling and sorting exercises with company employees.

## Outline

The paper is structured as follows: we begin by describing the empirical background for the study and why the multiple-case study at the diesel engine company is useful. We then situate our study in the stream of action research studies. In the method section, we introduce interview technique from narrative therapy as a facilitation tool in strategy workshops, review the methods used in previous action research studies with specific linkages to effectiveness assessment, describe our data collection which includes a sorting and labeling method for standardizing a facilitation technique. The results include the effectiveness assessment of data from twelve workshops: six with and six without narrative facilitation. The assessment is followed by an account of how we distilled the most important questions from the strategy workshops into a prescriptive interview guide that other strategy consultants can use directly in their own organizations. We achieved this through a review of the facilitation technique by three strategy consulting agencies followed by two exercises where employees at the diesel engine company first sorted 50 questions from the transcript into two clusters, labeled the clusters, and then condensed the 50 questions to six questions that represent the core of the interview technique. The interview guide is supplemented by a process and context guide to increase the instrumental relevance to strategy consultants seeking to use narrative facilitation technique. We present the experiences of the facilitator and the workshop participants to supplement the effectiveness assessment, and address the limitations of the study. The paper concludes that an empirical comparison of the effectiveness of a strategy workshop facilitation technique can be made statistically through a Mann-Whitney U-test when part of the workshop data can be numerically evaluated, and that combining qualitative and statistical elements in an action research design can enhance the specialization of strategy practitioners.

## Background

The diesel engine company had gone through two decades of success, but a downturn in international shipbuilding led to the need for a new strategy. During the successful years, everyone's attention had been focused on meeting customer demand for engines, and organizational problems were only perfunctorily dealt with. In 2016, an employee survey showed predominantly negative responses concerning roles and processes, and top management decided that the organization needed to find the root cause of the problems while ensuring that the solutions were aligned with the new strategy: a strategy workshop was therefore planned for the departments with particularly negative responses in the employee survey. The task to develop and facilitate the workshops was given to the first author in his capacity as in-house strategy consultant with a nine-year tenure at the company at the time of the task assignment. Based on a two-year part time training course in narrative interview technique, he had formerly facilitated other types of workshops, such as to define key messages in connection with international projects and develop a department strategy using narrative methods, in addition to conventional narrative coaching of managers. The effectiveness of the narrative facilitation, however, had never been explored because the previous workshops had always been one-offs, so there was never an opportunity to assess the facilitation technique against a control group.

In pursuit of an assessment of whether narrative facilitation of strategy workshops is effective compared to not using it, the first author therefore made an agreement with the managers of twelve departments that he would facilitate half the workshops using narrative interview technique. To eliminate any unconscious bias in the control workshops, which might produce a negative result in terms of showing the effectiveness of the narrative facilitation technique, it was agreed that he would not participate in them: they would be facilitated by the department managers themselves who had no prior knowledge of narrative interview technique. This methodological choice is a limitation in a purely experimental approach, in which as few variables as possible must change to enable comparison. The facilitator should therefore have been the same person in all twelve workshops, but deviating from this was deemed necessary in the quasi-experimental setting at the diesel engine company, a

choice which reflects the opportunistic nature of action research methods (Greenwood, 2015, p. 199). However, strategy consultants are not always available in organizations and not all workshops can be expected to be facilitated by the same person. We therefore argue that conducting some workshops with a facilitator and others without (conducted by the department manager or another member of staff) is normal organizational practice. Therefore, although the issue of the facilitator's presence/absence does not meet the conventional criteria, this action research study's design is common practice in organizations faced with busy production schedules and critical attention to time and money.

### **Action research**

This research is positioned within the organizational development (OD) tradition of action research (Coughlan, 2011b). In OD, action research is concerned with change that is brought about in close collaboration between researcher and practitioners through cycles of diagnosing, planning, acting and evaluating (Saunders, Lewis, & Thornhill, 2015). Action research must focus on real-life issues relevant both for theory and practice through collaboration that integrates systematic research, reflection and scientific knowledge (Coughlan, Draaijer, Godsell, & Boer, 2016).

The first author acted as insider action researcher (Roth, Sandberg, & Svensson, 2011), defined as a person who is an organizational member and a researcher at the same time, which offers the possibility to engage in action while having the opportunity to withdraw and reflect (Coughlan, 2001, 2003). The advantage of conducting insider action research is the opportunity for deep organizational embeddedness and contextual understanding that can lead to findings that are not available from an ethnographic perspective as an observer, and which enable the insider action researcher to acquire a different and perhaps deeper understanding (Eady, Drew, & Smith, 2015). Our insider action research has a dual purpose to develop better strategy workshop outcomes *and* learning in action. The limitation of the insider action researcher position is that the embeddedness can have a blinding effect on the researcher who can become subsumed by the organizational practice s/he is a part of. The position as insider action researcher therefore requires honest and transparent reporting of the empirical context and data collection (Huang, 2010, pp. 102–103).

### **Method**

This is a single-company multiple-case study where each strategy workshop can be regarded as a case study, and all cases were conducted at the diesel engine company. Like Russell, Walsh, Scott & McIntosh (2014), we use a case/control design to assess the effectiveness of narrative facilitation of strategy workshops. Additionally, we use sequential integration of data and quantify after the intervention (Martí, 2016). This methodological approach has been found suitable for evaluating action research projects and generating a learning potential for practitioners as well as researchers (Martí, 2016). Concerning sampling, the participants at the workshops came from the engineering departments with the lowest score in the 2016 employee survey (see the results display in Table 1). Each workshop included the department manager and his/her staff. In the workshops the first author did not facilitate, the respective department manager took on the role as facilitator.

The effectiveness of narrative facilitation was only assessed based on available documentation from the workshops and no longitudinal follow-up of the actual implementation of the actions that were planned at the workshops was made. Although the long-term implementation would have added interesting and relevant detail to the effectiveness assessment, only using the data that was produced at the workshops allowed us to focus on and assess the behavior of the facilitator and participants at the particular workshops. The comparison of data from the workshops with/without narrative facilitation was made as soon as data from all twelve workshops was collected.

### ***Narrative interview technique***

Narrative therapy is a talk therapy form that is based on the premise that people understand their lives in a storied – narrative – form (Polkinghorne, 2004, p. 53) and it is “intensely concerned with facilitating change” (Barry, 1997, p. 31). The change is related to the client’s problem for which s/he pursues therapy, and the change is sought and facilitated by the narrative therapist through influence mapping (White & Epston, 1990). By mapping the problem’s relations by way of externalization of its relations and effects on the client, the problem becomes the problem – not the client – an adage of narrative therapy. Narrative therapy’s primary focus is on exploring and detailing events where the problem was present and either negatively impacted the client or where the client or another person managed to exert some sort of influence over the problem, thus addressing ways to influence the problem, which can result in a greater sense of agency (Barry, 1997, p. 33; Polkinghorne, 2004, p. 55). Therefore, we propose that an interview structured by interview maps from narrative therapy can be useful in solving organizational problems in a structured manner (Barry, 1997, p. 35). The structure is provided by the interview technique’s question categories, which help the interviewer structure the interview: s/he can jump back and forward between the categories, but the overall progression of the interview should follow this pattern (White, 2007):

1. negotiating an experience-near and particular definition of the problem/solution
2. mapping the effects of the problem’s/solution’s activities
3. evaluating the effects of the problem’s/solution’s activities
4. justifying the evaluation

Narrative therapy’s rigorous and versatile, yet dynamic, interview technique can facilitate employees’ elicitation of problems that can be externalized and well defined, as well as corresponding solutions in the form of possible future actions. The interview technique is rigorous because it is structured via the question categories which can guide the facilitator’s questions, and it is dynamic because it can be used for a variety of problems and solutions and because each stage of the interview offers room for dwelling and speeding up according to the contextual need. The question remains, however, how we can test its effectiveness. In a therapeutic context, a randomized control trial showed positive, sustainable results from narrative therapy that were comparable to the effects of cognitive-behavioral therapy, psychodynamic-interpersonal therapy, and process-experiential therapy (Vromans & Schweitzer, 2011). Compared to other types of therapy, however, the advantage of narrative therapy for the practitioner is that it is practice-oriented and immediately applicable by a therapist-cum-facilitator and can be easily transferred outside of the consultation room. In an organizational context, narrative interview technique can aid promotion of psychosocial well-being (Hutto & Gallagher, 2017, p. 166) and enhance employee agency through the definition of future trajectories (p.158), which is a strategic activity (Mirabeau & Maguire, 2014, p. 1211). The effectiveness of narrative therapy as a facilitation tool in an organizational or strategic context remains uncharted.

### ***Effectiveness assessment***

Empirical assessments of the effectiveness of interventions are common in healthcare (Viswanathan et al., 2004). Here, the purpose is to assess the effectiveness of clinical interventions, e.g. a particular drug, compared to zero intervention or another intervention. Frequently, the clinical settings of healthcare research enable the comparison of a pretest with a posttest either using survey methods for data collection (e.g. Russell et al., 2014), similar to previous strategy workshop studies (Healey, Hodgkinson, Whittington, & Johnson, 2015; van Aaken, Koob, Rost, & Seidl, 2013), or using a statistical assessment to gauge the effectiveness of a clinical intervention based on laboratory data of a test group versus a control group (e.g. Rönsholt, Ullum, Katzenstein, Gerstoft, & Ostrowski, 2013). While organizational interventions bear little resemblance to the randomized control trials of healthcare, strategy consultants also need to know how effective an intervention is. We therefore suggest that strategy consultants can be inspired by healthcare in our quest to assess the effectiveness of a strategy tool.

More specifically, in a workshop aiming at aligning action planning with a strategy to support strategy implementation, we need a test that shows whether one type of strategy workshop facilitation is more effective than another type of facilitation. A test can be done by simply counting the number of times a value from one type of workshop wins over and is tied with comparable values from the other type of workshop – a win can be counted as one, a tie as 0.5. This simple test is automated in the Mann-Whitney U-Test (Hart, 2001), which was used by Rönsholt and colleagues (2013), which not only does the counting, but also gives a measure of probability: is the type A workshop more effective than type B and is the difference significant? One of the advantages of using this automated test is that it does not require a normal distribution of the data and that the number of values in the samples that are compared can differ – or in practice: the test can compare 23 actions from one type of workshop with 15 actions from another type of workshop, thus accommodating the messy and opportunistic character of data from action research (Greenwood, 2015, p. 199).

### ***Data collection at the workshops***

A six step strategy workshop process was specified and materialized in a workshop poster that could ensure that all workshops were conducted using the same process:

1. introduction of the strategy (a strategy one-pager was presented in relative detail and the participants could ask questions afterward)
2. discussion of perceived problems or frustrations by the employees of the department, using the recent employee survey as reference document
3. brainstorm on possible actions that would solve the frustrations
4. prioritization and selection of actions
5. development of an action plan
6. confirmation of the actions' link to strategy.

The workshop poster was presented to the managers who were briefed about the workshop process. An introduction of narrative facilitation technique, however, was not part of the briefing package. This allowed us to compare workshops with the facilitation technique conducted by the first author with workshops conducted by managers with no knowledge of the facilitation technique, while ensuring that the workshops had the same design via the poster. Step 4 was particularly important to our effectiveness comparison: employees prioritized their possible actions, physically represented by a post-it note for each action, in a prioritization matrix (Fig. 1) with 'easy to implement' as lower boundary and 'difficult to implement' as upper boundary on the x axis, and 'small impact on strategy' as lower boundary and 'big impact on strategy' as upper boundary on the y axis. This allowed us to compare the relative placement of post-it notes in the coordinate systems from the workshops with narrative facilitation to the workshops without narrative facilitation. Because the objective of the workshop was to align action planning with strategy, we focused our comparison on the y axis.

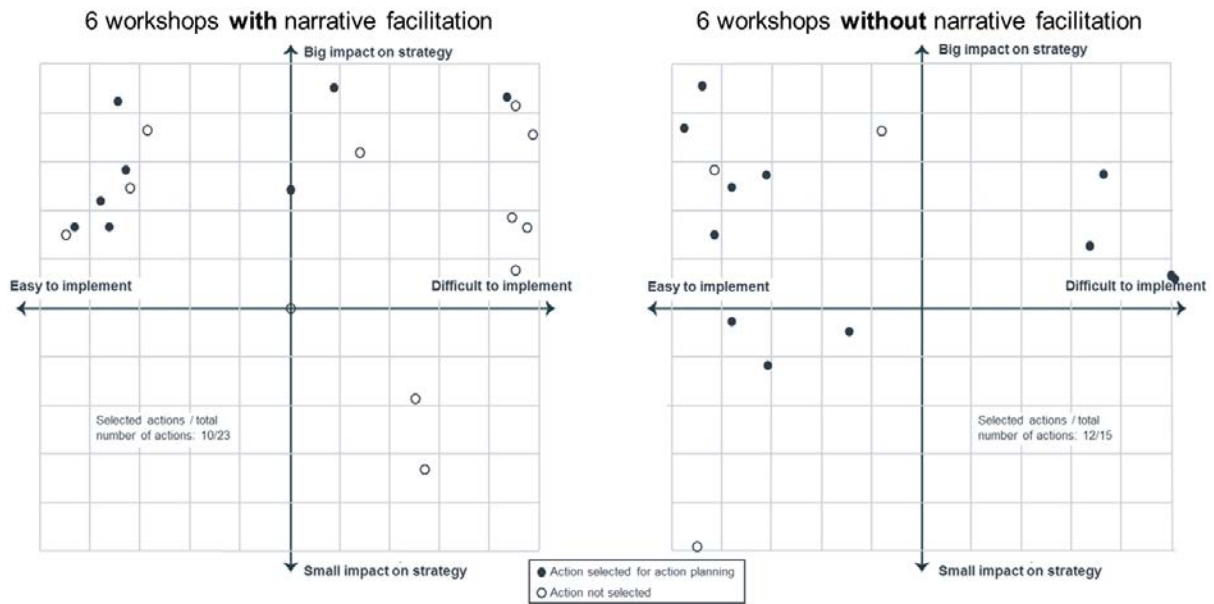


Figure 1. The prioritization matrix

After collecting the workshop posters from the 12 workshops, we applied a 10-point grid to the coordinate systems, measured the relative placement of post-it notes, and observed the y value for each post-it note denoting a possible future action. We also noted whether the action was selected or de-selected for action planning. We then performed the Mann-Whitney U-test.

### Results

The Mann-Whitney U-test shows that although the narrative therapy-facilitated workshop participants selected two fewer actions ( $n=10$ ) than the participants in the workshops without this facilitation ( $n=12$ ), the actions the participants selected had a significantly higher impact on strategy: the median relative impact on strategy of actions defined in workshops with narrative facilitation was 8.5 compared to 7 in workshops without ( $p = 0.0216$ ; Table 1). The statistical test of effectiveness suggests that participants were enabled through facilitation by interview technique from narrative therapy to devise problem-solving actions that were aligned with strategy to a greater extent than workshops without the facilitation.

Data from six workshops	WITH narrative facilitation	WITHOUT narrative facilitation
Visualization of selected actions' impact on strategy		
Number of actions prioritized	23	15



Number of actions selected	10	12
Employees' self-evaluated relative impact on strategy of selected actions (1 small impact; 10 big impact)	7, 7, 8, 8, 8, 9, 10, 10, 10, 10 (median: 8.5)	4, 5, 5, 6, 6, 7, 7, 8, 8, 8, 9, 10 (median: 7)
Mann-Whitney test	Mann-Whitney U = 26, n1 = 149, n2 = 104, p = 0.0216 two-tailed	
Number of workshop participants including managers	47 (average: 7.83)	66 (average: 11.0)

*Table 1. Workshop data*

Although an ex post assessment of data from action research may be challenged from a purely quantitative perspective, we argue that the relevance and benefit to strategy consultants outweigh methodological concerns. Thus assessing the effectiveness of a facilitation technique gives strategy consultants a tool for quantifying the effect of an intervention. To make narrative facilitation easily available to fellow strategy consultants, we below describe how a distilled version of the questions asked at the workshops was defined through sorting and naming exercises with employees at the diesel engine company and what the final result was, and finally we discuss the implications for action research.

### **Review of facilitation technique by consultancies**

To further enhance the external validity of the study, we presented the facilitation technique, in the form of excerpts from the 288 pages of transcript from the six workshops with narrative facilitation, and the statistical comparison to management/strategy consultancies, so that they could review the facilitation technique's possibilities and disadvantages. Out of six strategy consultancies in the same geographical area as the diesel engine company, one declined a presentation, one asked for further information but did not respond after receiving it, one did not respond at all, and three accepted our invitation – one asking us to present it to two different units. So in the end, we presented the study to consultancies four times. After a one-hour presentation and discussion of the applicability of the facilitation technique, we asked the consultants present at the presentation to send us feedback. They wrote that the facilitation technique could be useful for (excerpts):

- “creating a dialogue about the core of the problem and not just noisy moaning”
- “creating a direct link between strategy and actions by individual employees“
- and that “organizations and managers shouldn't be afraid to give room [Danish: give plads] for investigating problems/challenges”
- and that “the facilitation technique seems to be able to handle opposition at the same time as creating drive and direction, so that problems become manageable”

The facilitation technique could be particularly applicable in situations such as:

- “where you have a common goal or challenge”
- “launching a new strategy or kick-off”
- “large scale change projects that require users across the organization to be heard and understood”
- “making actions that support strategies, values and change related efforts”

They finished their evaluation by pointing out the weaknesses of the facilitation technique:

- “the implementation [i.e. knowledge of] of the technique”

- “the technique has been developed with a decade of experience [with reference to the first author’s tenure] in the specific company”
- “acceptance by all parties [managers and employees] so it may be advantageous to use a facilitator without prior knowledge of the situation”
- “it is important that the approach is not made too academic to the organization – tools of this kind need to be self-facilitating to be relevant in large organizations where the distance from the top to the frontline is often long”

After evaluating the feedback from the consultancies, we decided to follow the advice (see last bullet) to make a ‘stand-alone’ interview guide with built-in narrative facilitation so that it can work to solve problems and ensure alignment of solutions with strategy without the presence of a trained narrative facilitator (such as the first author who participated in a two-year part time narrative coaching education). In an action research perspective, the insider action researcher in this case can also be regarded as a method developer: we made an intervention, assessed its effectiveness, and then standardized it so that others can hopefully put it to use.

### **Validation by employees through sorting and labeling exercises**

In pursuit of an interview guide with built-in effective narrative facilitation, we first collected all facilitating questions from the 288 pages of transcript with a total of 123,448 words from the six workshops with narrative therapy facilitation: after eliminating doubles, the result was 50 questions cited verbatim from the workshops. Three randomly selected employees in the engineering area were invited to take part in an unlabeled sorting exercise where they screened the 50 questions, clustered them into an unspecified number of categories, and named the categories. They then formulated 1-2 exemplar questions for each category they defined, respectively. We synthesized their findings into two categories, using their own words to the extent possible: the first category was “discover the cause of the problem and get to the core of it,” the second was “find and plan possible solutions” – thus corresponding perfectly with position map 1 and 2, respectively, from narrative therapy (White, 2007). The first category had four exemplar questions and the second had three, i.e. by the end of the first sorting and labeling exercise, the 50 questions were distilled to seven, distributed in two categories.

In a second sorting and labeling exercise, we asked three other randomly selected employees in the engineering area to cluster the exemplar questions into the two categories and to order the exemplar questions in a way the three employees found suitable for a problem-solving workshop. Before completing the task, two participants expressed their dissatisfaction with one of the exemplar questions, and after discussing the particular question with the third participant too, we collaboratively decided to take the question out of the exercise and to continue with the remaining six questions. The result of the sorting exercise had inter-judge reliability of 100% meaning that all three participants clustered and ordered the questions in exactly the same sequence in both categories: unlabeled and labeled sorting can establish face and content validity and the target is to achieve more than 80% inter-judge reliability (Moore & Benbasat, 1991). Inter-rater analysis has previously been reported as helpful in an action research context (Kingsley & Chapman, 2013, p. 559). The resulting interview guide is based on the statistically effective facilitation technique at the diesel engine company where it was preceded by a strategy introduction and followed by prioritization and selection of actions, action planning, and a confirmation of the impact of the selected actions on strategy. For optimal effectiveness, the narrative therapy ideal of dwelling at and not rushing each problem and possible solution should be adhered to.

### **Guides to effective strategy implementation workshops**

**Discover the cause of the problem and get to the core of it**

1. What is the problem? Give a specific example
2. What does the problem prevent you from doing? Describe the effect
3. What is the real cause of the problem?

**Find and plan possible solutions**

1. What possible solutions are there that target the real cause of the problem and that minimize the effects of the problem?
2. What can you achieve through these solutions?
3. What impact will these possible solutions have on your efficiency and job satisfaction?

*Table 2. The narrative interview guide that was made as a result of the sorting and labeling exercises*

**Organization of the workshop**

Agree in advance with the participating department manager that s/he participates on equal terms with his/her employees thus suspending the management hierarchy during the workshop – this will facilitate participants' agency to implement the selected actions.

At the beginning of the workshop, present the objectives of the workshop clearly, then present the workshop design, i.e. step-by-step describe the tasks of the participants.

**Position of the facilitator**

The facilitator should emulate the position of a therapist and have process control, but not content control, i.e. ensuring that the workshop progresses according to the predefined objectives.

**Qualification of the facilitator**

Strategy consultants, skilled and experienced in the art of facilitation, would do well to inform themselves about the prospect of narrative interview technique as an aide to their consultancy work. An introduction can be found in chapters 1 and 5 on problem identification and solution finding, respectively, in the easily-read book *Maps of Narrative Practice* by Michael White (2007) which, although reporting on clinical practice, is transferrable to an organizational context.

**Attention of the facilitator**

Most time should be spent at the first stage of the narrative inquiry where an experience-near definition of a problem/solution is negotiated before progressing to the next stages of the interview. Be open to going back to an earlier workshop stage.

*Table 3. Process and context guide to accompany the narrative interview guide*

**Experiences from the workshops**

So far, the paper has focused on a third person inquiry of whether the intervention, in the form of the strategy workshops, was effective against the pre-agreed objective to align future action with the new strategy. Here we will discuss effectiveness from the first person perspective of the first author as facilitator, and the second person perspective of the participants' experience.

As facilitator of the workshops, the first author used the principles of narrative therapy to elicit problems so that these became 'experience-near' in participants' stories about particular events that they could remember: the more specific an account of a problematic event or course of events, the more conducive it was to identifying possible solutions. It seemed that dwelling at the detailed level of events helped penetrate the participants' superficial pre-conceived ideas about problems and their causes. Compared to the subsequent question categories in narrative therapy (see the categories in the subsection "Narrative interview technique"), most time was spent exploring the sequences of events that characterized the problems. Because this micro orientation toward details of past events was novel at the company, it appeared to make a positive difference in the participants' individual and collective understanding of the problems raised at the various workshops. When participants tried to regress to unconstructive superficial moaning about the problems, the first author relied on the

narrative technique to steer the discussion back on track, which it effectively did according to his perception.

The second person experience, as stated by the participants and documented in the audio recordings and transcript, supports the view that the experience-nearness of the elicited problems was foundational for the workshop process, as three participants stated in their respective workshops:

- Valdemar: “we have gone in-depth”
- Lucas: “[having the workshop] has forced us to talk about some of the things that frustrate us on a daily basis [...] it has required that we sit down, as we’ve done now, and forced us to think about it, right, and I think that’s pretty good”
- Noah: it’s good that [the workshop] starts with strategy because it sort of pulls our focus out of our own department and upward

The contribution of narrative interview technique to the strategy workshops is thus about reorientation and refocusing attention away from participants’ usual deadline and implementation focus which does not allow in-depth dwelling on problems. The strategy workshop process and narrative facilitation provide the participants with a space where they can first go deeper and explore problems in detail, and then go higher and link future actions that will solve problems to the company’s strategy.

### Limitations

The workshops were held at the company in a common work form that the participants were familiar with from normal work situations, which strengthens the study’s external validity (Rothwell, 2005). However, data collected through action research methods is opportunistic (Greenwood, 2015, p. 199). Consequently, a number of limitations are relevant for this study (see Table 4). We recognize that our data collection is suboptimal compared to healthcare clinical trials, but we note that this will nearly always be the case for action research on organizational interventions. Research borne out of action can never be as neatly and tightly planned and executed as called for by qualitative and quantitative methodologies that strive for distance between the researcher and the researched (Greenwood, 2015). When organizational action researchers pay attention to and often drive interventions that change organizations, at least part of our data is out of our control. Although we can subscribe to and strive to meet a certain standard for data collection, this is not always possible. Does this mean that we shouldn’t share our findings or that they cannot be informative to other action researchers and practitioners? No, but we need to present our data and the empirical context in which the data is collected as honestly and transparently as possible (Huang, 2010, pp. 102–103), to constitute the authenticity of the researcher and the study (Coghlan, 2011a, p. 75).

Limitation	Problem	Our countermeasures
The first author only conducted the workshops with narrative facilitation, not the ones without	In an experimental setup, the facilitator’s presence is required in both types of workshops for a proper comparison of results	The presence and absence of strategy consultants vary in organizations, and conducting some workshops with a facilitator who is not a member of the department and others where the department manager acts as facilitator was normal organizational practice at the diesel engine company
Convenience sampling: lack of randomized sampling of departments	Managers may have agreed to be part of the research study due to their familiarity with the first author as in-house strategy consultant	As counter-balance we only included workshops with the exact same process (five workshops were excluded) to maximize consistency
Social desirability	Participants may have anticipated that the aim of the	We have collected measures and prioritization through a

	workshop was to select actions with a high impact on strategy and thus positively biased their evaluation of an action's strategic impact	discussion between several individuals (Podsakoff, MacKenzie, Lee, & Podsakoff, 2003, p. 887)
Manipulation	Can we claim that narrative interview technique was really used?	All participants confirmed that they recognized narrative interview phases in a post-workshop manipulation check (Colquitt, 2008, p. 619)

*Table 4. Limitations of the effectiveness assessment*

Future research to substantiate or further this effectiveness assessment in a Danish for-profit company can advantageously be conducted in other similar companies or dissimilar companies in cultural contexts where workshop participants can be expected to be less prone than the Danish employees at the diesel engine company to share their experiences about organizational problems. Another possible focus area is sampling: our assessment is based on 12 workshops with a total of 22 selected actions out of a total of 38 identified actions – larger numbers would have been more desirable in an experimental setup. With this larger sample, more methodological controls can be introduced to minimize possible bias, such as random sampling, consistent use of the same facilitator in workshops with/without narrative interviewing, and comparison of facilitators with little and comprehensive knowledge of narrative interviews, respectively. However, although it would have been satisfactory to meet the quality criteria from experimental quantitative methodology, action research has something else to offer: an effectiveness assessment that is directly transferrable to organizational practice and can be calculated using free online statistics resources (e.g. <http://www.socscistatistics.com/tests/mannwhitney/>) to guide strategy consultants' work.

## **Conclusion**

The effectiveness of a facilitation technique for a strategy implementation workshop can be made statistically through a Mann-Whitney U-test when part of the workshop data, e.g. employees' self-evaluation of possible solutions' impact on strategy, can be numerically evaluated and empirically compared to workshops without the facilitation technique. The test can inform strategy consultants whether a facilitation technique is effective compared to not using it. Using a statistical effectiveness assessment in a non-experimental empirical action research setting requires a contextual re-evaluation of quantitative sampling criteria. A statistical assessment using data generated through action research cannot be expected to meet the criteria for true experiments which call for equivalence between control and treatment groups through random assignment. Rather, data collection through organizational interventions depends on the empirical possibilities of the intervention, but this does not preclude statistical assessment provided that the empirical context is presented transparently and honestly. This study shows that benefits for practitioners can be gained from borrowing assessment tools from other research domains, e.g. using effectiveness assessments from healthcare in a study of strategy workshops.

An interview-based facilitation technique can be standardized by identifying questions in workshop transcripts, clustering them according to a relevant domain theory, in this case narrative theory (White, 2007), and subjecting the large amount of questions to a sorting and labeling exercise where employees boil down the many questions to a few and formulate exemplar questions to form a standard interview guide.

This study is qualitative, coupled with statistical elements in the effectiveness comparison. Although qualitative methodology does not allow us to theoretically generalize based on the study's findings, we have striven to increase the external validity and methodological generalizability of the study by subjecting the findings to critical review by three consultancies who pointed out the strengths and weaknesses of the facilitation technique. The prescriptive interview guide with built-in narrative

facilitation was developed through two structured labeling and sorting exercises with employees at the diesel engine company. Our aspiration is for the interview guide to serve as an introduction to the narrative facilitation of problem solving and solution identification in strategy contexts. The interview guide is thus only a time-limited starter package that will allow strategy consultants to move forward as they become more experienced narrative facilitators. We therefore encourage you – the strategy consultants and kindred spirits reading this – to use and further develop the interview guide for your own organizational purposes and to report on the effectiveness of your studies. Only then can we together tackle the challenge of knowing whether our strategy tools are effective.

## Acknowledgements

The authors wish to thank Dr. Hilary Bradbury for leading the review process of this article and two anonymous reviewers for very constructive comments.

## Funding

This study was supported by grant no. 4019-0002B from Innovation Fund Denmark.

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