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ENGAGING EMPLOYEES WITH THEIR ORGANISATION'S VISION: USING VISUAL STORYTELLING THROUGH SKETCHING

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ABSTRACT
This paper explores the use of visual storytelling, for instance sketching, in organisational strategy practices. It contributes to an understanding of how design education has to change in order to broaden the skillset of design students, for them to be able to redesign organisations.

Organisations are competing in a complex and dynamic environment [1]
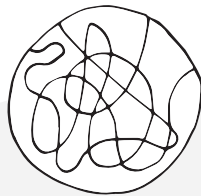
This means that organisations have to constantly redesign themselves to address the challenges they face from the environment [2]

Gap in knowledge: linking design and organisation literature

LITERATURE REVIEW

storytelling
reflection
visualisation
materialisation
strategy as practice
employees
routine
organisation

Research question:
"How to enable innovation consultants to get their clients' employees to better understand, be motivated about, and apply the vision and strategy into their daily work?"
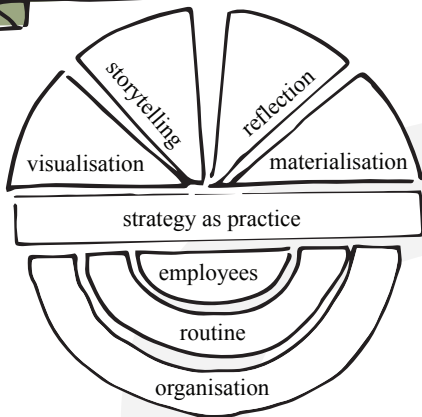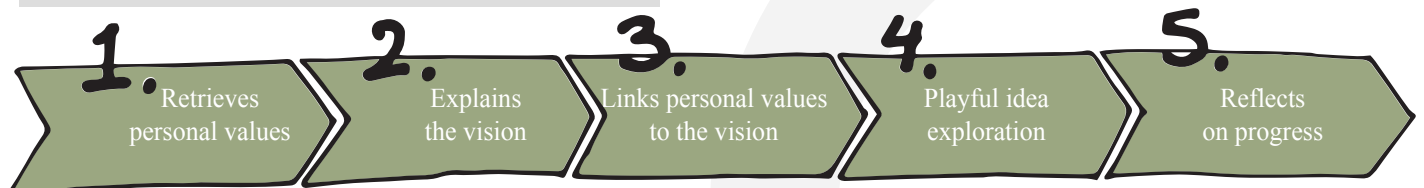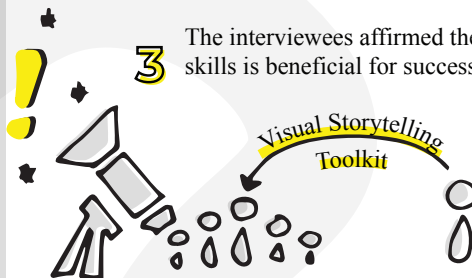
Design direction:
designing a toolkit which can be used by innovation consultants during workshops

THE KEY FINDINGS

1 Corporate culture together with motivated and engaging leadership are key factors for successful strategy implementation, and should thus be taken into account.

2 Not only the routine of client's employees need to change for successful strategy implementation, but also that of the strategy consultancy itself.

3 The interviewees affirmed the belief that using design skills is beneficial for successful strategy implementation.

RESEARCH DESIGN

Internal analysis (strategy consultancy)

External analysis (former client)

Interviews with 4 employees

Observations of the team

Interviews with 7 employees

Visual Storytelling Toolkit

1. Retrieves personal values

2. Explains the vision

3. Links personal values to the vision

4. Playful idea exploration

5. Reflects on progress
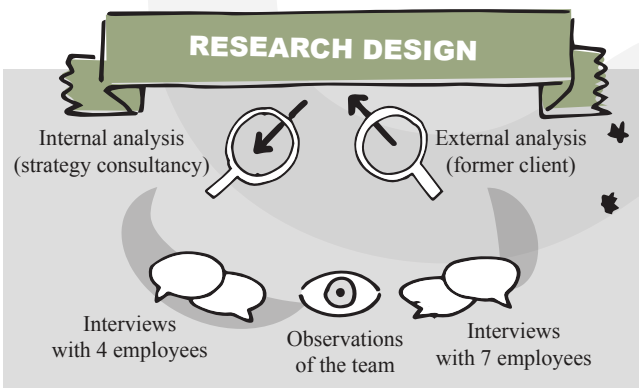
The Visual Storytelling Toolkit is divided in five steps to be executed in a workshop given by the innovation consultant aimed at the client's employees.

Keywords: Vision, strategy, employees, routine, visual storytelling, design

The need for companies to innovate continuously has never been greater due to the complex and dynamic conditions organisations compete in [3, 1].
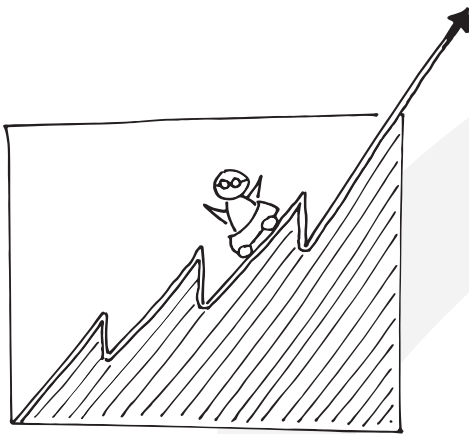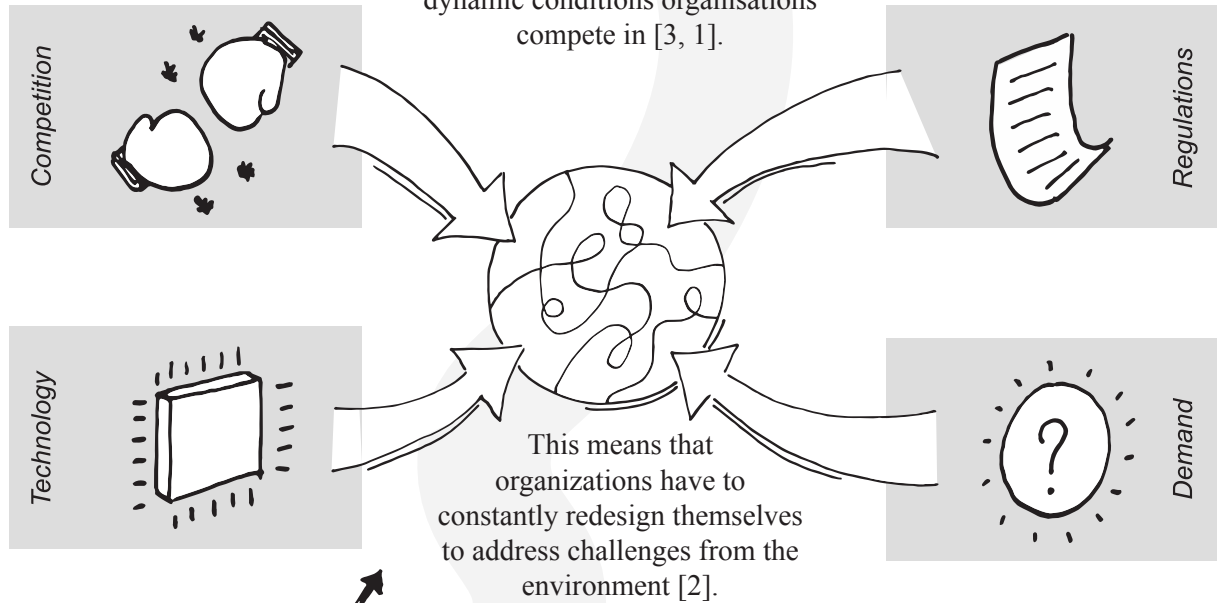
Competition

Regulations

Technology

Demand

This means that organizations have to constantly redesign themselves to address challenges from the environment [2].

PRODUCT

PROCESS/ ORGANISATION

Design-led companies create 32% more revenue compared to other companies [4]. Designers are not only designing products within a company anymore, but are also tackling complex system-level designs [5, 6]. We see designers increasingly engage as organisational changers, not only as product-developers. This requires a broadening set of design skills for designers.
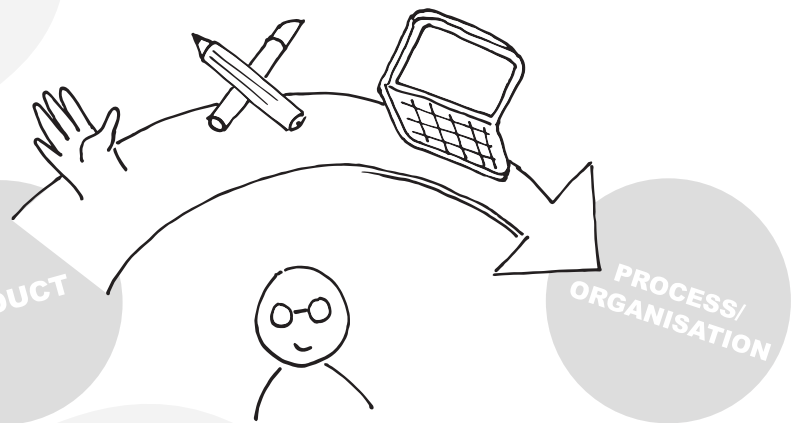
Design education should aid them in developing those skills (e.g. sketching, materialisation, storytelling). This means a shift from product-oriented to process/organisation-oriented design education.

Curently, sketching is mostly taught as product visualisation. However, considering designers' engagement in complex system-level design, design sketching education needs to be directed towards organisational change as well. Yet, this shift has not gained much attention in design education.

CASE STUDY

This paper explores opportunities for design education to prepare future students and stimulates the use of visual storytelling in organisation change. This is done with a case study, which takes place in the context of a design master graduation project. It examines how visual storytelling through sketching can help a strategy consultancy engage its clients' employees with a new vision. We provide examples and insights on how design practices can be used to change an organisation, and how they can be taken into account when reinventing the role of visualisation and sketching in design education.

The theoretical framework presents current knowledge and discovers opportunities for using design in organisations regarding vision engagement among employees. It consists of three parts: design skills, the state of the art on strategy as practice, and the organisational context.

storytelling

reflection

visualisation

materialisation

strategy as practice

employees

routine

organisation
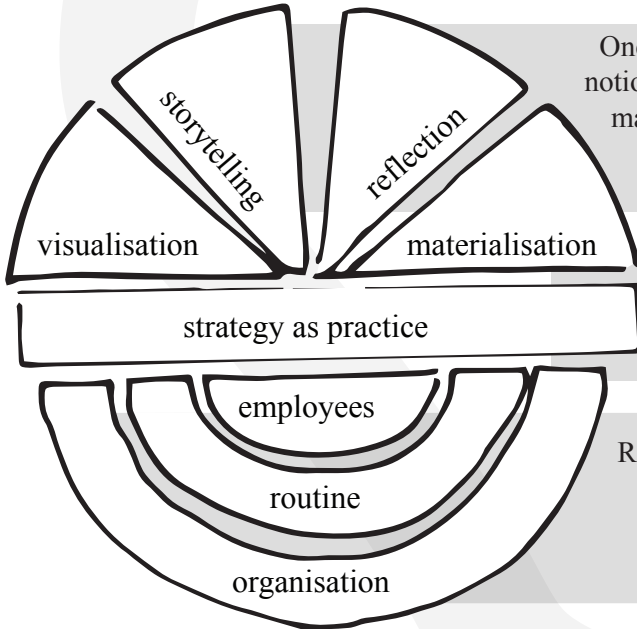
One of the strengths of designers is that they can turn abstract notions into tangible and observable outcomes. This tangibility makes concepts 'real', which can reduce uncertainty and can encourage stakeholders to explore different possibilities [7, 8].

The practice of strategy - who is involved, what they do, how they do it, what they use, what influence it has on shaping strategy [9].

Routines are recognizable patterns of actions that are repetitively performed [10]. Reflective practices support routine change (e.g., of employees) by fostering learning and articulating knowledge [11].

INSIGHTS

There is a gap of knowledge between design and organisation literature, regarding how design is practically used in organisations as strategy tools. Much has been said about the assumed (theoretical) use, but little on the actual (practical) use of tools by employees. This meant the found insights needed to be confirmed and elaborated in practice.

GAP OF KNOWLEDGE

1 Corporate culture together with motivated and engaging leadership are key factors for successful strategy implementation, and should thus be taken into account.

2 Strategy implementation is only successful when the employees' routines are changed. Reflection, experimentation and more reflection is necessary to change routine.

3 Design skills can make concepts explicit, visual and tangible on an organisational and personal level, which can improve the chance of successful strategy implementation.

The strategy consultancy 'P2', where this case study took place, is located in the Netherlands. It aims to create future-proof visions and strategies, together with its clients. The case study is part of a master graduation project aimed at showing the value of design for organisations.

P2
(strategy consultancy)

RESEARCH QUESTION

"How to enable P2 to get their clients'employees to better understand, be motivated about, and apply the client's vision and strategy into their daily work?"

RESEARCH DESIGN

Internal analysis
(P2 - strategy consultancy)

External analysis
(former client)

Interviews
with 4 employees

Observations
of the team

Interviews
with 7 employees

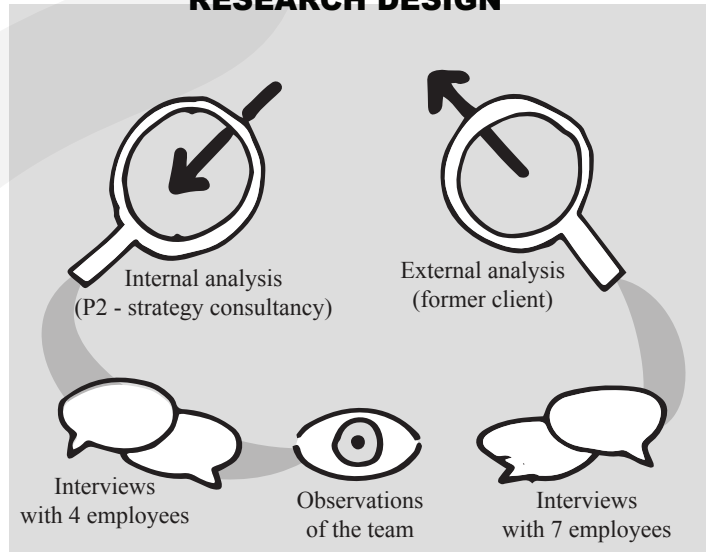The case study was divided into two parts. The internal analysis revolved around P2: by doing interviews with its employees and by observing them, we mapped their way-of-working and found design opportunities in their process. The external analyses revolved around a former client of P2: interviews with employees from the former client resulted into insights on how to engage them with the strategic vision.

"Reflection remains a recurring theme on the agenda. Being consciously busy with reflecting varies per department" - client's employee

External analysis

3 The interviewees confirmed the belief that using design skills is beneficial for successful strategy implementation.

INSIGHTS

1 Not only the client's employees routines need to change for successful strategy implementation, but also those of the consultancy itself. By changing their own routine, they are better suited to change their clients' routines.

"The most difficult part is to reach a big group, while they are all working in their 'daily practices bubble'" - P2 team member

Internal analysis

"You can create a high level strategy, but eventually you have to deepen it. Especially the beginning of each step has to be manageable" - P2 team member

Internal analysis

2 Considering the consultancy's process (next page), the focus of this study will be on its 4th phase to have more impact on strategy implentation.

"The trick is to take people along in a process to make them really enthusiastic. That just takes time" - client's employee
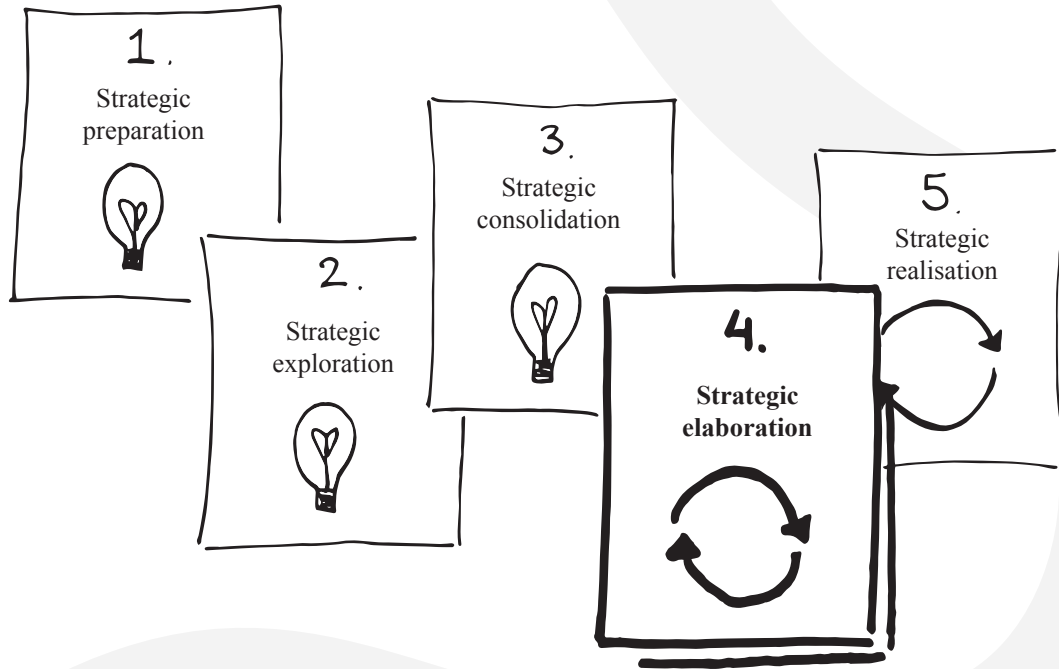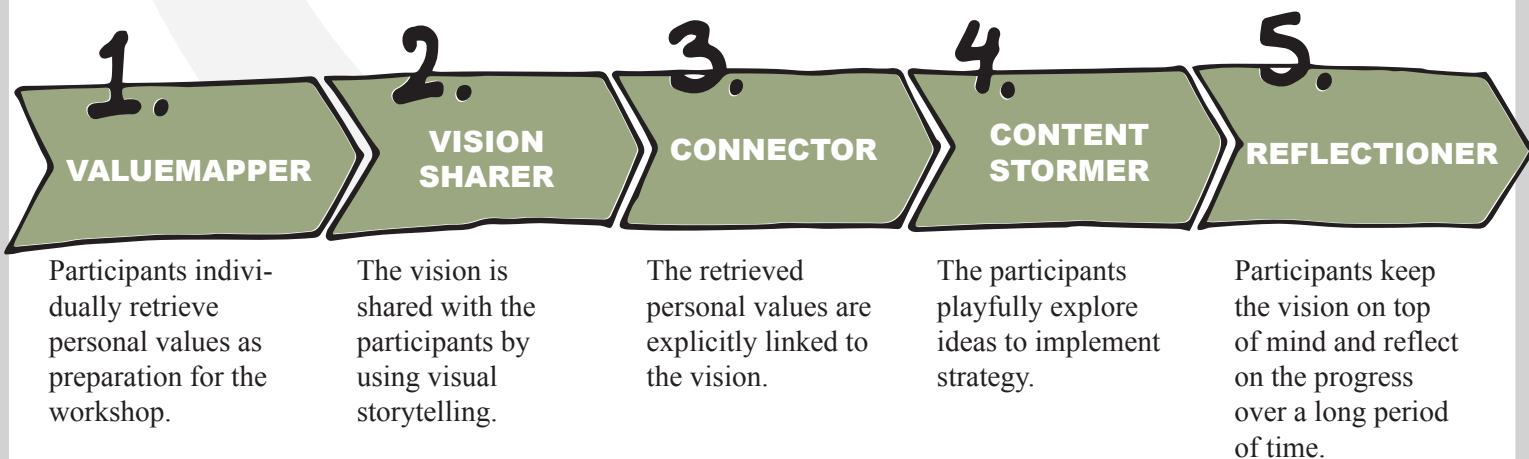
External analysis

The process of the consultancy P2 was mapped and the 4th phase (Strategic elaboration) emerged as the most relevant for this project. This phase represents the shift from vision creation to strategy implementation. It entails the switch from top-down structure to involving employees. These insights were taken into the next phase of the master graduation project, which resulted into a design solution to support employees to implement a strategy and increase the chances of successfully reaching a vision.

1.
Strategic preparation

2.
Strategic exploration

3.
Strategic consolidation

4.
Strategic elaboration

5.
Strategic realisation

THE DESIGN

The Visual Storytelling Toolkit

Sketching, visualisation and storytelling practices were used to create the Visual Storytelling toolkit, based on the insights from literature and the case study. The Visual Storytelling toolkit was designed for P2 and their clients, and consists of a five step approach to engage employees with a new vision. For each step, there are tool-suggestion cards, which can be organised in tailor-made workshops.

1.
VALUEMAPPER

2.
VISION SHARER

3.
CONNECTOR

4.
CONTENT STORMER

5.
REFLECTIONER

Participants indivi-dually retrieve personal values as preparation for the workshop.

The vision is shared with the participants by using visual storytelling.

The retrieved personal values are explicitly linked to the vision.

The participants playfully explore ideas to implement strategy.

Participants keep the vision on top of mind and reflect on the progress over a long period of time.

The toolkit was evaluated with team members of P2, which resulted into surprising insights. Although the toolkit was initially meant to change their clients' routines, it became a way to change their own: it enabled the team to make their routine explicit, reflect on it and change it. This was a first step in changing their way-of-working from individual and intuitive, to a coherent, collaborative team effort.
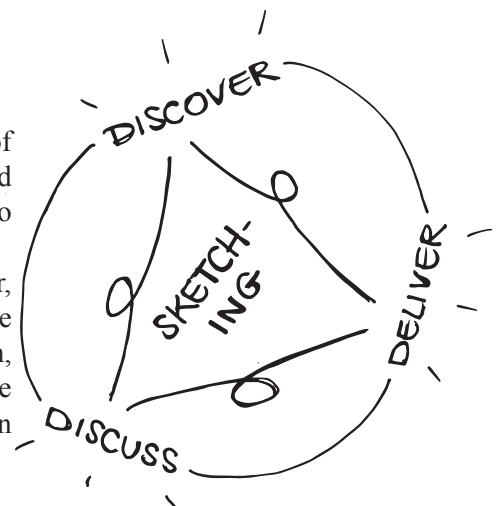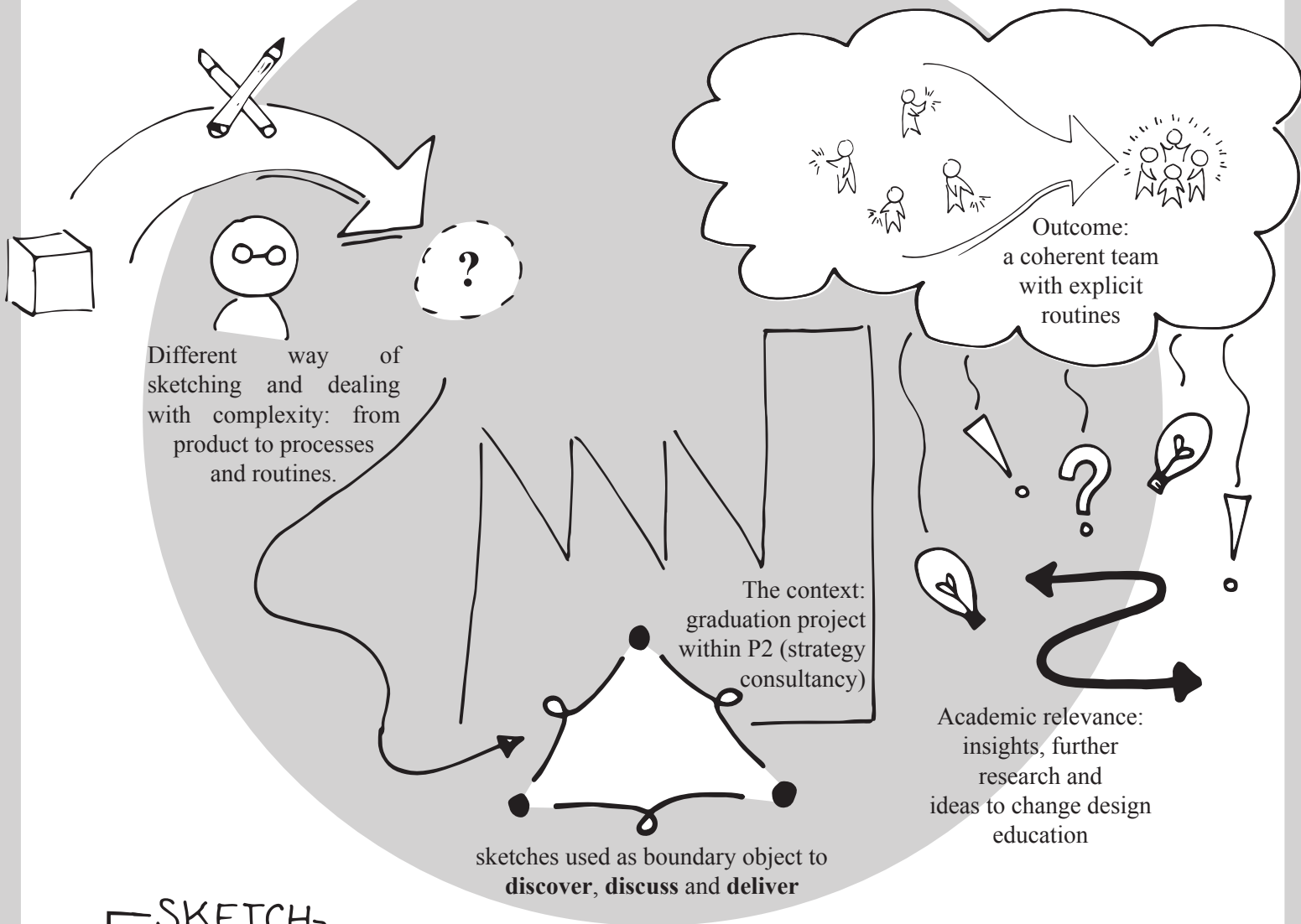
ROUTINE

design student

P2

P2's clients

The routines of the master graduation student resulted into the toolkit, which can change the consultancy's routine, in order to change their clients' routines.

"This is a good explication. It makes it easier to reflect afterwards on what did and didn't work during a particular workshop set-up" - consultancy team member

Evaluation of toolkit

"It make the structure and steps more explicit. We often work intuitively, but the toolkit helps to make explicit what we do" - consultancy team member

Evaluation of toolkit

"It's an original design. Clever how you have worked out something so abstract into something so concrete and practical" - consultancy team member

Evaluation of toolkit

DISCUSSION

Materialisation (cards) and visualisation practices (sketches of tool-suggestions) made the consultancy's routine more explicit and clear. Especially the visualisations helped the consultancy to discuss about routines, adding clarity and uniformity.

These visualisations acted as boundary objects: a way to discover, discuss and deliver change in organisations. Boundary objects are e.g. visual representations [12], which serve as a guide for action, but their way-of-use still allows flexibility [13]. The cards were shown among the consultancy's team to communicate and explain their individual way-of-working.

DISCOVER

SKETCH-ING

DELIVER

DISCUSS

CONCLUSION

Different way of sketching and dealing with complexity: from product to processes and routines.

Outcome: a coherent team with explicit routines

The context: graduation project within P2 (strategy consultancy)

Academic relevance: insights, further research and ideas to change design education

sketches used as boundary object to **discover**, **discuss** and **deliver**

SKETCH

From sketching products...

...to sketching processes...

...to sketching routines, relationships and complexity

FUTURE RESEARCH

Subsequent research on this topic could help in strengthening the relevance of the future of sketching in design education. Upcoming research questions could include "how to change the way sketching is educated to design students?" or "how to capture the dynamic nature of organisation design through sketching?".

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