Let employees take the stage: Using role-play in your organization

If role-playing were a Broadway show, it would have been running for years. Despite its long run in areas like military training and emergency response, it’s making a corporate comeback, thanks to the introduction of social media and virtual tools. Not surprisingly, many organizations are rediscovering how role-play can be used to create corporate value. Although role-play might seem a bit unconventional, some are finding that a new production can reinvigorate training and give employees a fresh way to acquire skills and tools.

This Blue Paper examines the basics of role-play in the office environment. It will explore some benefits it might yield, as well as the drawbacks. However, this Blue Paper will show that with proper planning and execution, you can bypass the negatives, and our detailed how-to guide will help make your role-play a success.

You don’t need an arsenal of costumes or elaborate sets to get started. In fact, almost everything you need already exists in the organization. Prepare for a casting call. You may need to hold auditions in the near future.

Let’s go backstage: Corporate role-play basics

So, exactly what do we mean by corporate role-play? It’s when employees reenact hypothetical situations encountered on the job, occurring between customers or other employees. It usually involves two or more participants—one person agrees to assume a hypothetical or legitimate business role opposite another person who also assumes a different role. For example, participants assume the roles of customer, vendor, sales associate or manager, or they can simply represent the role they have in the office. They are then presented with a business scenario and act out how they would handle the situation.

It can be an effective training tool to improve interactions and outcomes between customers, employees, venders, and even other business owners and associates. Role-play often brings people face-to-face to troubleshoot issues, thus allowing employees to observe body language and establish connections. Virtual role-playing is also an option, and companies may use technology to enhance the experience.
Role-play is used for a number of business functions. For example, it's used in sales to help educate sales teams on products, enabling them to sell the product better and improve closure rates. It also helps identify challenges or opportunities that might be encountered across the sales process or any touchpoint related to customer service. In addition, it's a great training method for how to handle disgruntled customers, improve overall customer service and more. ¹ If executed correctly, it can improve customer satisfaction and retention rates.

But role-play isn’t limited to sales and customer service. In truth, it can be used in almost any department to address a variety of business situations. Perhaps your goal is to resolve issues in the workplace or to improve communication and morale. Role-play is a great way to mix things up in a non-confrontational setting. It is also used to simulate and analyze issues in less likely areas like information technology or manufacturing. Some organizations even use it with job interviews to see how potential candidates are able to communicate and think on their feet. Others use it with employee evaluations, asking employees to pretend to be a manager or supervisor to help evaluate job performance.

In short, there are many business opportunities to apply role-play, and it's not just reserved for one business area or function. It can be applied to almost any situation.

Why should employees take center stage? The benefits of role-play

Role-play is a participatory technique and, for this reason, considered a first-class learning opportunity. You've probably heard the Chinese proverb “Tell me and I’ll forget, show me and I’ll remember. Involve me and I’ll understand.” That’s the idea behind role-play. It allows learning through:

- Doing
- Imitation
- Observation
- Feedback
- Analysis
- Conceptualization

Unlike some training methods, it’s a hands-on opportunity to engage employees and promote more lasting impressions. Not only can employees learn through participation, but they also learn by simply observing and listening to others. It can lead to greater understanding of workplace challenges and make employees more empathetic to common situations or customer experiences.

According to Training Magazine®, role-play improves listening skills, builds confidence and leads to creative problem solving.² There are other benefits to using role-play in your organization, too. For example, it can:

- Improve communications
- Provide hands-on training
- Offer a low-cost training alternative
- Enhance brainstorming and teamwork
- Evaluate new approaches without risk
- Increase empathy and tolerance in the workplace
- Analyze problems from multiple perspectives
- Develop conflict resolution skills
- Establish trust among employees

And that’s just the short list. In reality, there are many ways your organization could benefit from role-play, depending on your needs and objectives. Since it places employees in real-world scenarios, the information that is gathered is usually relevant, timely and accurate. In addition, it can target specific business challenges or identify new challenges. It takes the guesswork out of figuring out what employees or customers think and has been proven to be more effective than handouts, presentations or videotapes.³ As a bonus, it can be less costly than traditional training methods. Perhaps what makes role-playing most appealing, however, is that it can improve productivity, thus improving your bottom line.

From the employee perspective, there’s a lot to be gained with role-play. Using the tools available in real-life scenarios makes employees feel more comfortable doing their jobs because they know what to expect. This, in turn, improves accountability because employees have more ownership and are less intimidated to tackle the tough issues. It also makes them feel valued and builds a sense of camaraderie and teamwork. According to Marcus Sheridan from The Sales Lion®, role-play is “the most under-utilized, as well as the most under-appreciated, sales training tool in the entire sales industry.”⁴

If you want more information on the benefits of role-play, the consulting company Training and Development World has a more detailed list outlining additional benefits of role playing. No doubt, there are compelling reasons why an organization might use role-playing. That’s why it’s taking center stage.

Box office flops: The drawbacks of role-play

As is the case with almost every business approach, role-play might not always work as intended. In fact, there are a few stumbling blocks that can turn what is meant to be a fun experience into a box office failure.

In some cases, the mere mention of role-play sends employees running. That’s because it’s not an easy, instinctive thing to do. Employees are asked to put themselves on display, and many find this approach intimidating. It can make employees feel awkward, which for some people, causes a great deal of anxiety. By nature, it’s not a comfortable activity and requires participants to think out of the box quickly and often with an audience watching.

Role-play might sound easy, but it can be difficult and tedious, especially if it’s not applying real-life situations. Some find it more difficult to role-play with a co-worker because they have greater organizational knowledge than a customer. Customers usually ask more basic questions than employees would think to ask. Also, employees know the types of solutions or offerings that exist, thus presenting a greater challenge to truly understanding the customer problem or situation. For this reason, there’s a belief that it won’t always replicate challenges and issues faced in the real world.

Another challenge with role-play situations is that employees don’t take them seriously. Some employees might find the exercise to be a waste of time or a social opportunity to catch up with other co-workers. It can be difficult to capture their attention and convince them there’s a value to role-play and that it is not just a far-fetched endeavor. This challenge can be mitigated by providing ample guidance and a well-defined plan. When role-play is treated as real and is administered in an organized manner, participants give it their best.

Multitasking is another obstacle to role-play. Role-play asks employees to focus on two tasks at the same time: the assigned role and the application of new skills. Yet people generally aren’t able to multitask, simply because it’s more instinctual to focus on one task at a time. According to some research, multitasking
drastically slows us down and has a negative impact on performance.\(^5\) Hence, some argue that role-play makes it harder, not easier, to learn new skills.

Finally, role-play can be a failure if it is not implemented properly. Some organizations think it’s simple to throw out scenarios and ask employees to develop solutions, but in reality, effective role-play requires a significant amount of planning. Not only does the effort need to be well-organized and defined, but it also requires leadership and resources. As with the theater, you need a director and producer; otherwise, the efforts can fail due to trainer inadequacy or a weak understanding of how to use role-play properly.

For some of these reasons, Jeff Toister from SalesForce\(^®\) says role-play doesn’t work for customer service training.\(^6\) He suggests using an alternative called **experiential learning**. This training technique is similar to role-play, only participants are able to engage without taking on another persona. It allows employees to get hands-on practice applying and learning new skills in a completely realistic situation. One of his suggested activities trains customer service representatives to work on a fast, busy day while still providing attentive service to each individual.

Overall, however, there is the consensus that role-play is a valuable training tool as long as you can avoid the pitfalls. The key is to incorporate a lot of planning and rehearsals.

**How to be a Broadway success: Tips for effective role-play**

So how do you implement effective role-play in your organization and avoid the downsides? Below are some tips to consider before you begin the production process:

- **Set the stage.** You need to clearly tell the story and disclose whether you are using it for assessment or training. Are you teaching new skills? Or are you assessing and critiquing employee performance? If you’re using role-play for skill assessment, this needs to be clear upfront so employees aren’t taken off guard. Surprising actors (i.e., employees) with on-the-spot auditions can lead to mistrust and anxiety. Determining whether to use role-play for training or assessment will also help frame goals, structure and scenarios.

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\(^6\) Ibid.
• Write a good plot. Identify specific situations where a problem or issue may be encountered. Some areas that are well-suited for role-play include customer conflict, managerial conflict or employee performance. It’s also critical to identify what you want to address specifically, whether it’s handling angry customers, closing a sale or dealing with a problematic work situation. Consider using real-life examples or actual interactions. For example, you might play back a real customer recording and ask participants to take a new approach to the situation. If possible, use actual work locations, too. Depending on the scenario, work desks, checkout counters, and delivery or warehouse areas are good backdrops to provide more realistic settings. Plus, it will allow employees to have all the necessary notes or equipment needed to truly assume a role.

• Plan the rehearsal. Role-play is not an impromptu event. If participants aren’t given a structured format, they won’t take it seriously. Know what you are going to do before, during and after role-play. How will you evaluate the scenario? What will you ask employees to take away from the exercise? What kind of meaningful and specific feedback will you give after each performance?

• Introduce it slowly. Actors don’t want to be thrown on stage without an introduction and character assessment, and neither do your employees. Introduce role-play slowly and give mini role-plays before they’re forced to jump on stage. Even better, select actors in advance so they know to prepare when possible. At a minimum, let participants warm up to the idea so they become more comfortable when performing.

• Make it challenging. Role-play should be challenging for each participant. You don’t want it to be one-sided and have one participant simply read a script while the other one is forced to think on his or her feet. Give both participants a scenario and opportunity to freelance. It’s OK to use scripted pieces for some of the exercise; just don’t let it drive the process.

• Pause and rewind. If the timing seems right, it’s OK to interrupt and provide direction. Act like a director, and interject when appropriate to provide guidance and constructive feedback. Don’t be afraid to mix things up, too. Ask role-players to switch roles, or invite a different employee to replace an existing role if people seem stuck.
• **Define “right” answers for each skill being taught.** This might include single responses or a series of steps to get to the desired outcome. Explain why each answer is preferable, and identify which answers are clearly not preferred. This will help provide valuable and actionable feedback to participants.

• **Use costumes or props.** It might sound silly, but even grown-ups enjoy getting into character and dressing up, so throwing in a few props doesn’t hurt. It makes it exciting and fun, all while keeping the audience engaged. It also helps keep the environment low-stress, and that will lead to better performances.

• **Use a good facilitator.** You need an assistant director, someone who can keep the session moving or stop it when momentum is lagging. Some recommend hiring a professional facilitator or interjecting tools that provide business simulations. **Lean Forward**, for example, is a training organization that provides custom business simulations for role-play. It also provides training for role-play and gives organizations guidance on where it might be helpful in your organization.

• **Define an award-winning act.** What’s the happy ending to a scenario? It’s important to provide examples of how an “expert” might handle the situation. After the employees complete a role-play session, give participants an example of a Tony®-worthy performance, highlighting the gold standard in your company. Then give participants a chance to repeat what they’ve learned until they are satisfied with the response. Consider using a “go-it-alone” approach and see if they can apply learnings solo.

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**Use the house lights: Virtual role-play**

Virtual role-play is not exactly new, but it’s being used more frequently. It’s similar to face-to-face role-play, only it’s done using virtual tools and methods. Tools like FaceTime® and Skype® are easy mediums for role-play.

Virtual role-playing activities were initially applied to call centers. But in truth, they have applications in sales, customer service, employee development, or any situation that involves employee and customer interaction. It’s relatively easy to combine this type of role-play with e-learning and training courses, and it can be easy to implement. It can also be cost-effective compared to other training efforts.
A benefit of virtual role-play is that it can be easily recorded and stored for future and immediate use. It enhances the effort because employees can watch their performance and evaluate responses. You can also use role-play recordings for future training—employees can learn from watching even if they weren’t there.

Developing a virtual role-play activity is similar to creating other learning sessions, and the same tips apply. The biggest difference is the addition of a virtual medium for both participation and a feedback. To learn more about how to develop virtual role-play, check out an article from eLearn Magazine on Using Virtual Role-Play to Solve Training Problems.

The lead role: Role-play with sales and customer service

While role-play can be applied in a number of business areas, it is highly effective in sales and customer service. An article from Business.com outlines how sales processes are particularly well suited for role-play. For instance, the scenarios can enhance the skills of a salesperson, increase product knowledge, and teach the salesforce how to build rapport and trust with customers. To quote the article, “Just like Broadway actors, good sales performers need to practice their lines before they go live.”

How can you use role-play to improve sales and customer satisfaction? Ask customer services or sales associates about the challenges they most frequently face with customers, and address them with role-play. There are really unlimited scenarios that can be reenacted and used as learning opportunities. To give you an idea, consider role-play for the following topics commonly found with sales and customer service:

- Addressing angry customers
- Answering difficult product questions
- Closing a sale
- Cold calling
- Communicating product promotions or sales
- Interacting with customers in a sales or retail setting

To help identify scenarios, download a free Create-a-Role-Play Handout from Sales Training and Results, Inc. The handout walks you through the planning process.

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and helps identify a sales situation to address. It also provides a salesperson planning form to collect information on next steps and actions after the role-play.

Need acting coaches? Where to find assistance

There are a lot of new and updated ways to add role-play to your training curriculum or to use it for employee assessment. Some of these are listed below:

- **MindTools** is an online training resource that can help get you started. *Role Playing: Preparing for Difficult Conversations and Situations* is a great resource that provides step-by-step instructions for effective business role-play. There’s even a well-defined example of a full role-

- **Lean Forward** is another organization that provides custom business simulations for role-play. Among other things, it prepares professional role-play and process simulations. For example, role-play sessions can be customized courses specific to your organization. Whether you need to help employees navigate complex business processes or customer service challenges, there are a number of opportunities for professional assistance.

- **YouTube** also has a number of videos that may be useful. *The Workplace Scenario Role-Play At The Career Pillar Challenge* is a short clip that shows business students engaging in role-play and might be a great icebreaker to show employees how it works. There are other videos that range from humorous to instructional. A quick search will give you a lot of ideas.

- If you want professional assistance with role-play, a number of companies can help. **SNI**, a global provider for training in sales and negotiation, can provide a professional facilitator. According to SNI, a professional facilitator can provide a more authentic role-play experience and keep the effort on task. The UK-based company **Nelson Training** can actually provide professional actors for role-play training in your business. According to the website, there are a number of benefits to bringing real actors. For example, real actors might facilitate a more realistic environment as they portray a potential client or irate customer. Nelson Training promises to deliver actors who are highly trained to improvise and shape the role-play toward defined business goals dictated by the organization. **Action Actors** is another resource. Based in Australia, it is a human-resource consulting company with 400 workers who are fully trained to assist with role-play in a
number of industries.

- The popular business blogger Hugh Fox III has a list of 36 Workplace Scenarios to consider for role-play. It references real-life examples that are well suited for role-play and gives examples of clearly defined scenarios.

- If you’re using role-play for sales improvement, in his article “How to Improve Sales 101: Role-Plays” Marcus Sheridan from The Sales Lion® makes a strong case as to why it might be the most effective tool available. He also provides tips on how to make it work.

This is just a sample of some of the resources that are at your disposal. The key is to do some research and use it to determine what will work best in your company.

Opening night: Are you ready?

Whether role-play is something that can be integrated into existing curriculums or added as a new training tool, it’s clear it could yield benefits in your organization. Whether you use in-person or virtual training, it can be a fun and fresh way to invigorate employees while improving skills. So why not write your role-play script? You never know what will be the next Broadway hit.