



## chapter One

# Understanding Role Playing

**W**hen I began as a corporate trainer, I had a rather narrow view of role playing. I saw it as a technique to be used primarily in very focused skill development programs, which it certainly is, but I failed to realize the full range of learning situations in which it could be used and how very effective it could be. Then came the day I was working to improve a career development course and realized that I needed a short activity toward the end of the day—something to move beyond just raising participants' awareness of their job satisfaction needs. I wanted to immediately apply what they had learned about their needs and increase their comfort levels in talking about those needs.

I came up with a short, very focused role-playing activity where participants found partners and took turns playing the roles of career counselor and themselves discussing their job satisfaction needs. I said, "Pretend you are talking to a career counselor. The career counselor leans in, looks you in the eye, and says, 'Tell me, Susan, what's important to you in a job? What are the key factors that you are looking for?' Then tell the counselor what you are looking for." The whole activity took about twenty minutes, and they loved it.

I loved it too. Not only did it focus and solidify participant learning in that particular situation, but it also extended my own understanding and appreciation of role playing. I knew that role playing was a process in which someone acts out a part in a given context

and that it was a structured, goal-directed, learning technique. But I then realized that role playing comes in many forms and can serve many functions. Best of all, when role playing is done well, it is an incredible tool for learning.

Let's take a deeper look at this tool for learning. We begin by defining *role playing* further and then look at some of the terminology used with role-playing activities. Next, we investigate some of the common forms this tool takes and the functions it performs in education and training. And finally, we examine the unique benefits of role playing and why it is such a powerful learning tool.



## DEFINING ROLE PLAYING

In the fields of education and training and development, role playing is a structured, goal-directed learning technique that uses the acting out of a part in a specified context to give participants an immediate opportunity to apply information or practice behaviors presented in class material. That's a long definition! But look at the essence of the definition: *a structured goal-directed, learning technique*. A role play needs to be structured—planned, orderly, and well thought out. It must meet a goal, and not just any goal. It needs to meet a *learning* goal.

Look at the last part of the definition: *to apply information or to practice behaviors presented in class material*. As a learning technique, role playing involves the immediate application of material being studied in the learning situation. For example, in my career development class, that short role-playing activity allowed participants to verbalize to someone else what they had learned about their job satisfaction needs. In a customer service class, role playing could be used to let participants practice dealing with difficult customers, and in a management development class, role playing could be used to practice a problem-solving model or rehearse a performance appraisal approach.

Role playing is not a random acting out of a situation for fun or catharsis. To be effective, it must be directed toward the use of specific behaviors to bring about specific results. And while a role play can be fun or may contain a certain cathartic element, the goals are to test, try out, and develop the use of particular behaviors.

A role play is not a simulation. Although role plays and simulations seem similar on the surface, they are different types of learning activities in length, complexity (simulations usually being much longer and more complex), and purpose. Although role playing includes some simulation and simulations include some playing of roles, role plays and simulations differ in their design and structure, and they often have different learning goals.

In most simulations, learners practice desired behaviors, but the learning goal also

includes understanding and experiencing a particular situation as well as the practice of specific behaviors. A simulation lets you experience what it is like to be in a particular circumstance—a person without a home, an angry customer, a stranger in a foreign land—and the experience leads to learning. In role playing, the activity is shorter and more focused; the goal is to practice a particular behavior in a given circumstance—interviewing a homeless person, dealing with an angry customer, asking for directions in a foreign land—and the practice leads to skill development.



## THE TERMINOLOGY OF ROLE PLAYING

There is a variety of vocabulary and terminology used in describing role-playing procedures and the assigned roles given to participants during role playing. You are probably familiar with many of the following terms, but there may be a few that you have not heard or used before. Let's review these basic terms:

- A *learning activity* is an educational exercise designed to provide information or direct experiencing of a subject matter being studied. Role playing is one type of learning activity; other types are educational games, simulations, case studies, structured discussions, and paper-and-pencil activities.
- *Role playing* is a structured, goal-directed learning activity. It uses the acting out of a part in a particular context to give participants an immediate opportunity to apply information or practice behaviors presented in class material.
- An *individual role play* is the specific interaction of one participant acting out a given situation with a second participant, while a third participant observes that interaction and, if there is a videotape being made of that interaction, a fourth participant records. An individual role play can include doing the activity only once, followed by feedback and discussion, or it can include doing the role play followed by feedback and discussion, then doing the activity again trying to improve the interaction.
- A *round of role playing* is a series of individual role plays in which each participant in the group gets to go through an individual activity using a particular situation. Each participant could do the individual role play only once or could do it, get feedback, and then do it again. It is also sometimes referred to as a round of role plays when an individual person does two or three enactments of the same basic role play but with the deliberate use of increasing difficulty within the role plays.

- A *second round of role playing* is the phrase commonly used when all of the participants in a small group have each completed an individual role play and the activity now continues with each participant going through a second individual role play using a different situation. Multiple rounds can also use incremental difficulty, with the first round using relatively easy situations, the second round using more difficult situations, and the third round using even more difficult situations.
- *Single role plays*, sometimes called *fishbowl role plays*, are role plays in which volunteer players from the group act out one role play at a time in front of the whole group. *Role rotation* is a variation of this type of role-play activity, with the main role passing from one participant to the next to the next and so forth (Buckner, 1999).
- *Feedback* consists of information about the role-played interaction given after the interaction and intended to provide useful data for skill development. It can be given verbally, in written form, or through the viewing of a videotape of the role play.
- *Debriefing* is a questioning process that occurs after an event has ended in order to supply information about that event. In learning activities, debriefing is used to clarify the process that learners have just undergone and to address what was learned and how participants will use what they learned in the activity in actual situations.

One issue that appears as you begin to structure and implement role-playing activities is what to call people who are playing different parts in the role play. Over the years I have found it very helpful to assign participants titles or names to use for the different roles that they will take with one another during the role play. In the introduction and setup of the role play, I usually define these titles and the duties or actions to be taken when a person is playing that part. Here are a few definitions to consider:

- *Initiator*: The person who is the focus of the individual role play and is practicing improving the use of a model or particular behavior. If feedback is being used, this is the person who receives the feedback.
- *Actor*: The person acting out the other role and often following the instructions and suggestions of the Initiator as to how that role should be carried out.
- *Observer*: The person who observes the role play and either gives verbal feedback to the Initiator or fills out a written feedback form that is given to the Initiator.

- *Recorder*: The person who uses the camcorder to tape-record the role play. This person can be used in addition to the Observer, in place of the Observer, or as both Observer and Recorder.
- *Coach*: The person who stands at the sidelines of the role play and instructs, guides, and encourages the Initiator.
- *Timekeeper*: The person who monitors the time and keeps the role play on track and within its assigned time limits. This person can also serve as Observer, Recorder, or Coach.



## TYPES OF ROLE-PLAYING ACTIVITIES

Role plays can be used to meet a variety of educational goals and can be found in a variety of formats. Role-play learning activities can range from the simple, repeated use of standard phrases all the way to complex, extemporaneous enactments of difficult situations. I have categorized at least five basic types of role playing that appear in the majority of training and educational programs, and undoubtedly there are a few additional forms and permutations. Let's take a look at what I have found to be the five most common types of role plays. As you read through these descriptions, think of the role plays that you have used or participated in at some time and consider which categories they fit into.

- *Warm-ups* are short, simple role-playing activities used to get people ready to move on to more difficult and complex role playing. They can be used to get participants acquainted with one another as well as acquainted with class content and specific behaviors. For example, a warm-up role play could have learners mixing and mingling and sharing information about themselves and their expectations for the course. (See Role Play 2, "What Are You Doing in a Place Like This?" in Chapter Five.)
- *Behavior rehearsals* are role plays that contain the repeated use of standard or prescribed phrases or specific behaviors. They can be used to practice specific company-required behaviors or to condition learners to a routine use of a specific pattern of behavior. For example, in a customer service class, participants could use behavior rehearsal to practice introducing themselves to customers at a special customer-focused event. (See Role Play 6, "Greetings and Salutations," in Chapter Six.)

- *Application activities* offer practice in using specific models or following given guidelines in hopes of making participants comfortable and familiar with those models and guidelines. For instance, an application activity could be used in a supervisory skills class to let learners practice a model for asking for a change in behavior. (See Role Play 11, “You’re Driving Me Nuts,” in Chapter Seven.)
- *Problem- and people-focused role plays* are small-group activities in which participants build skills in handling specific problem situations or in dealing with particularly difficult people. Role plays that let participants practice dealing with unhappy customers or negative people are good examples of problem- and people-focused role plays. (See Role Play 18, “Why Are You People So Difficult?” in Chapter Eight.)
- *Impromptu role plays* are fairly unstructured enactments for which participants have very little time to prepare. These extemporaneous activities are often used to build skills in the quick, effective handling of unexpected situations or to test the learner’s ability to automatically apply a model or guidelines. They can also be a great way to start off a discussion of familiar ineffective or otherwise bad habits. For example, as a beginning activity in a class on improving meetings, an impromptu role play of a typical bad meeting could be a fun way to elicit the basic problems found in many meetings. (See Role Play 22, “Meeting Madness,” in Chapter Nine.)

And so we find that role-play learning activities can be used to meet a variety of educational goals. The design of such activities can range from the simple to the complex, from those that are highly structured to those that are less structured, and they can be used in a wide assortment of learning situations. The immediacy, flexibility, and learning potential of this tool can bring important advantages and benefits to your classroom.



## THE POSITIVE ASPECTS OF ROLE PLAYING

Role playing has been a popular educational and training technique since the early 1970s when it was borrowed and modified from the much-admired psychodrama therapeutic techniques of the time (Blatner, 1988). The many advantages and benefits that role playing brought to the educational classroom and the corporate training environment soon made it a standard learning tool. Michael Galbraith and Bonnie Zelenak (1991) describe the benefits of role playing as including showing the strengths, weaknesses, and conse-

quences of certain behaviors or attitudes; depicting divergent points of view; exploring interpersonal relationships; and bringing to life theoretical or philosophical concepts.

In a relatively short period of time and under regulated conditions, a participant in a role play can immediately test new information and try out new behaviors, see how things feel, make adjustments, and try again. Participants can listen to one another and broaden their understanding of different people and different situations. And it's possible for all of this to happen in a safe, controlled environment, with few, if any, negative consequences. The flexibility of form, adaptability of content, and elasticity of time needed for role playing and the many opportunities it gives for participants to learn from one another are tremendous. Let's explore these advantages and benefits.

## Immediate Application of Learning Concepts

The ability to immediately apply a class concept to the learner's behavioral repertoire is an important feature of role playing. This immediate linking of action to information has a significant advantage: it makes learning concrete and therefore increases the chances of participants' using the information and the behavior being learned after the training.

A key concern for any instructor who is presenting learning content—information, ideas, methods, strategies, or behaviors—is getting the learners to consider, analyze, use, try out, and practice that content. When it comes to the instant application of classroom content to the individual learner's behavior skills, there are limited approaches available. Real-time, real-life applications are most often available for behaviors that involve using things. For example, if the learner has been listening to information on how to use a new computer program, the immediate application of that content involves the learner's doing it, using it, and trying it out on a computer in the classroom with an instructor nearby to guide and give information.

When it comes to immediately applying classroom learning to real-time, real-life behaviors involving interaction with people, the options facing an instructor are either to bring in people from outside the classroom or use the people already in the classroom. And while it is possible to have outside people in (volunteers from the workplace, coworkers, friends, and so forth), the most common practice is to use the other participants in the class to “play the role” or “act like” real people would act in the situation being addressed. Therefore, in a skill-building class on improving public presentations, class members can act as audience members and sit through one another's presentations, asking questions and responding as real audience members would. In a class on meetings, participants can practice new skills in mock meetings where they take on different roles of meeting attendees and try out behaviors discussed in the class.

Such immediate application activities have the powerful advantage of offering instant testing of behaviors, practicing of models, or following of guidelines, leading to the continuous improvement of behavior. As an instructor, you can watch and guide your participants as they use what you have taught them, and you can help them improve right then and there. This immediacy allows the learning to be reinforced and solidified on the spot and highly increases the likelihood that the behavior will be used outside the classroom and back on the job.

## Safe, Structured Practice with Feedback

We've all heard, and probably used, the axiom, "practice makes perfect." And it does—if you practice the right behaviors and practice them over and over. Using role-playing activities in the classroom allows the learner to do just that. In structured, guided activities, participants can practice those behaviors, receive instant feedback regarding their performance, modify and improve their performance, and continue practicing over and over in a variety of situations.

Instant feedback is a powerful component of performance improvement. In role-playing activities that include effective feedback, learners are not trying out new behaviors in a vacuum; instead, they are able to immediately take in information about their performance, discuss what worked and what didn't, consider how things felt, choose what changes they want to make, and try the behavior again. This modifying and developing of behavior in real time in the classroom increases the likelihood that the behavior will be used back on the job.

Repetition is a key learning principle, and it can help increase the mastery of those new behaviors. Not only does role playing provide for the repetition of new learning, it also pairs that repetition with positive reinforcement. Within the context of a role play, key information is restated, participants practice a new model or a new approach several times with pleasing consequences, and positive associations and connections are established. All of this increases the probability that the new information, skills, and behaviors will be retained and applied back on the job.

Participants are also more likely to practice and develop those right behaviors if they are doing so in a safe, controlled arena. Instructors can provide such an arena by ensuring confidentiality, modeling the correct behavior, providing guidelines to be followed, and then carefully monitoring classroom practice sessions. How to take all of these steps to provide a safe, controlled learning environment for role playing is covered in the next few chapters. But suffice it to say that implementing safe, controlled practice sessions gives learners the security they need to try out and develop new and difficult behaviors.



## Flexibility of Use and Content

The flexible nature of the design of most role-play activities allows immediate adjustment to various learning circumstances. Role plays can be adjusted for the amount of time they take, the amount of practice given, the difficulty level of the tasks, and the relevancy of the content. All of these adjustment factors make it possible to focus directly on the needs of the specific learners who are present and can lead to meaningful performance improvement and real-time behavior change.

Most role playing can be done in single rounds with or without repeating the interaction after feedback is given. This alone allows for a good bit of time flexibility, but the ability to add a second round, and even a third, if time and situation permit or, conversely, to cut back from the two rounds planned and have only one round, gives even more flexibility to this learning tool. As an instructor, you can monitor the learning and provide more or less practice as needed.

Role playing also offers immediate opportunities for both the learner and the instructor to evaluate the learning and make adjustments to content. Individual learners can assess their understanding of class information and their performance of specific behaviors and seek more information or increase the difficulty of the role-play situation in some way. As an instructor, when you watch the participants apply what they have learned, you may find topics and areas of program content that need more attention or clarification. You can call a time-out in the activity and immediately address such issues, or you can address them later in the program. This evaluation of the learning at different points in the role-playing process lets you modify that process in order to achieve maximum learning.

## Opportunity to Learn from Others

One of the greatest benefits of any type of group learning activity is the opportunity to learn from others. Although role-playing activities are done in a variety of formats, all of those formats give learners the opportunity to listen to, observe, interact with, and learn from other participants. The benefits of this exposure to others include increased learning from observation and imitation, broadening of participant awareness of situations and perspectives different from their own, and the heightening of individual self-knowledge.

Vicarious learning from observing others can be extremely helpful in skill development. In role-playing activities, particularly small-group activities, participants observe other individuals using the models and applying techniques from class content. Through

such observation, learners can find new and different methods of applying class content and develop a wider range of behaviors. Such observation can also be a type of mental rehearsal that builds skills and increases self-confidence.

The discussion and feedback components of role-playing activities give participants a chance to listen to the ideas and opinions of other people as they discuss their problems and situations. Participants are exposed to other viewpoints and ways of perceiving reality. They may learn about issues and situations they didn't know existed. Such exposure can broaden their outlook and help them to understand and empathize with other people.

Receiving feedback and holding discussions with other participants can also give individual participants insight into their own behaviors and the effects that their behaviors have on others. Such information can help them understand how other people see them and why people react to them the way that they do. This heightened self-knowledge can be used to modify behaviors and facilitate better interactions and relationships with others both on the job and outside the job.

A powerful combination of these opportunities to learn from others occurs in the debriefing process. Debriefing is used to clarify the process that learners have just undergone and to address what was learned and how they will use what they learned. Learning benefits are doubled or tripled during debriefings when different individuals and small groups discuss what they did and how they did it, what they discovered and realized about themselves, and how they plan to apply their learning. Chapters Two and Three present methods and techniques for planning and conducting powerful debriefing activities.



## PUTTING IT ALL TOGETHER

Role playing is a structured, goal-directed learning technique that uses the acting out of a part in a given context to give participants an immediate opportunity to apply information or practice behaviors presented in class material. Role playing is not a haphazard acting out of any situation using any behavior. To be effective, it must be directed toward the use of specific behaviors to bring about specific results in a given situation.

Role-play activities can range from simple warm-up events to get people ready, to the repeated use of standard phrases and behaviors, to complex enactments of difficult situations. Within a secure, structured environment, a participant in a role play can immediately apply new information and try out new behaviors. With its flexibility and adaptability of form and content, plus the opportunities it provides for participants to learn from one another, the role-playing experience can be a highly efficient arena for learning, skill development, and confidence building.

To fully benefit from all the advantages of role playing, it is imperative that trainers and educators learn to use role playing in the most effective manner possible. That requires that the fears and hesitations associated with role playing be addressed and minimized. It also requires a structured approach to role playing that includes careful planning and implementation procedures. All of these are covered in the next three chapters. Let's begin with the resistance that some people have to role playing.

