

Avoiding the valley of death in educating strategists

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ABSTRACT

Billions of dollars and hundreds of millions of hours are invested every year in executive education. However, much of this investment dies in a familiar “Valley of Death” (VoD) wherein what is learned in the classroom is not applied when the strategist returns back to work. Based on 30 in-depth interviews and live observation, we investigate the architecture of an executive education program designed to avoid the VoD. In the observed program, senior partners of a strategy consulting firm, and their key strategist clients, are brought together to co-learn strategy associated with scenario planning, and, at the same time, improve their ongoing business relations. We find that adopting a “paired learning structure” and utilizing “live case content” results in “group-level co-learning” (or the co-production of knowledge) that, participants report, avoids the VoD. This research contributes to the scholarship on learning architecture in executive education by establishing linkages to the literature on client-partner relationships, modelling the student, and service co-production in knowledge-intensive organizations, and, in the end, provides a blueprint that professional service firms and business schools, seeking to produce more value for their participants, can jointly emulate.

Introduction

How strategists re-educate themselves to keep their skills on the leading edge is an important professional issue, particularly so as strategy involves a “precarious role” (Whittington, 2019: 79) and strategy consulting is a “precarious business” (ibid: 95). When strategy succeeds, it has been found to contribute to improved organizational performance – so if strategy were to fall behind, that would impede its contribution to improved performance (Paton and Wagner, 2014). Thus, as de Geus (1988: 71) suggested, “[t]he ability to learn faster than your competitors may be the only sustainable competitive advantage” for strategists to remain relevant and in business (see also Nordqvist and Melin, 2008; McKenna, 2006; Whittington, 2019).

Billions of dollars (Moules, 2020) and hundreds of millions of hours are invested every year in executive education (Doh and Stumpf, 2007; Long, 2004). Scholars have, for some time, wondered how much of this collective investment is ultimately unproductive (Kesner et al., 2003). Unsurprisingly, research suggests that a vast majority of Human Resource Development professionals – 85% of those surveyed by Charlton (2005: 22) – believe that evaluating the impact of executive education will become more important.

Professional firms seeking to keep their top professionals educated do so with at least two related purposes. They try to ensure that their investments pay-off in terms of translating the lessons into actual use with client engagements. They also want to avoid sending executives to programs to learn things that they will not apply in their professional and commercial practice. Meeting these objectives matters to strategists, as research suggests that “executive education has increasingly become more tightly linked to the front end of strategy” (Conger and Xin, 2000: 97), which – to work well, they propose – “will need to work in parallel with changes in organizational design” (ibid.).

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Our research question, therefore, is: How can one educate strategy professionals so that what they learn is enacted? To study this issue, our stance is that of practical rationality (Sandberg and Tsoukas, 2011).

While we theorize from actual problems, rather than articulating research questions based on gaps in the literature (Sandberg and Alvesson, 2010), our research speaks to historical and contemporary gaps identified in the extant long-range planning literature.

First, scholars have identified a gap between sufficient academic rigor of business education, including executive education, and the practical relevance of the content, skills, and perspectives gained from management curriculum (Birkinshaw et al., 2016; Costigan and Brink, 2015; Rubin and Dierdorff, 2011). Paton, Chia, and Burt (2014: 269) argued for a third option to bridge the gap between relevance and rigor, which, in their terminology, is to “relevate;” that is:

to deliberately disrupt the established boundaries of a problematic with a view to expanding the scope and range of issues considered relevant or irrelevant to a particular decisional imperative; it effectively re-problematizes a previously defined problem. In so doing, it forces a new comprehension of the situation faced thereby leading to potentially novel solutions being generated.

While a chief aim of the learning architecture we studied was to achieve balanced relevance and rigor, or to “relevate,” that is not the primary contribution of this article.

Second, relevant to executive education is an important academic discussion in the journal *Academy of Management: Learning & Education* (AMLE) centered on the posture that business schools adopt with regard to the roles of students. Despite early support for the student-as-customer model (see, e.g., Franz, 1998), research has demonstrated the utility of an alternative position, namely, the student-as-partner (or “junior partner”) model, which has been argued to be ultimately “more nourishing, more concerned with taking individual differences into account, [and] more focused on making the educational enterprise truly collaborative” (Ferris, 2002: 190). In support, Vuori’s (2013: 178) research suggested that “the customer metaphor is said to passivize education,” which emphasizes “the personal risk of the student; standardize[s] and routinize[s] teaching; and even lead[s] to the exclusion of students from the university community.” While the student-as-partner model can supposedly be “fruitfully applied to university education across the curriculum,” according to Ferris (2002: 193), a follow-up AMLE article, “Students as Clients,” indicated that the partner model is still a matter of debate with regard to the design of business education: “Although customer and client are used interchangeably in casual conversation ... [t]he key difference is that customers rely on their own judgment to evaluate a purchase, whereas clients must rely on the professionals to tell them what they need” (Armstrong, 2003: 372). One can read the student-as-client critique as being only a partial eclipse of the student-as-partner model; where rather than competing, both models can constitute a natural combination. This would fully recognize that some students learn as partners while others do so as clients. After all, if “there are fundamental [educational] differences in student needs,” then innovative program designs are needed to account for these sorts of “corresponding differences” (Armstrong, 2003: 374). While a chief aim of the learning architecture we studied was to treat the student as both a partner and client, that is not the primary contribution of this article.

Third, a related discussion is found in the professional services literature on the partner-client relationship with emphasis on co-production (on partner-client relationships, see, e.g., Broschak, 2015; Rogan and Sorenson, 2014). A touchstone in this line of thinking is Bettencourt et al.’s (2002) “Client Co-Production in Knowledge-Intensive Business Services.” Though not explicitly applied to knowledge-intensive educational services such as executive education housed in business schools, their insights still constitute essential literature for the article. As Bettencourt et al. (2002) predicted, “knowledge-intensive business-to-business services ... account for an increasingly larger share of innovation and value creation,” which, we contend, can also include partnerships between business schools and strategy consulting firms via the mechanism of executive education. Echoing Larsen (2001), Bettencourt et al.’s (2002: 100-1) defined knowledge-intensive business service firms as:

enterprises whose primary value-added activities consist of the accumulation, creation, or dissemination of knowledge for the purpose of developing a customized service or product solution to satisfy the client’s needs

Admittedly, insight on customer co-production dates back a century or more (Ramírez, 1999). Contemporary understandings have since expanded to a broader range of activities that includes clients and partners (Lovelock and Young, 1979). Likewise, this shift encompasses a wider range of practices such as “stimulating cooperative attitudes,” “informal organizational mechanisms such as socialization,” and, essential for understanding this article, “joint planning for managing successful partnerships” (Bettencourt et al., 2002: 104-5).

While this research is chiefly motivated by practical problems facing education providers, it is also relevant for a gap in the literature between these two currents identified above. The first is the literature about treating students as either partners or clients or, as we contend, both, and the second is the literature on co-production in knowledge-intensive enterprises. Thus, we also frame our argument, and justify our inquiry, by bringing these two currents in the literature, which have been separated by a gap, together into a single conversation, which constitutes one of the basic contributions to the literature(s) germane to this article.

Given our stance on practical rationality as informed by literature on the student as partner or client and co-production in knowledge-intensive enterprises such as higher education, we foremost frame our core sensitizing concept by adopting an old idea developed by Shell innovation executives. Termed the “Valley of Death” (VoD, hereafter), these executives used the idea to describe the difficulties managers faced taking innovations from the initial “proof of concept” stage to implementation (Ramírez et al., 2011). This VoD construct was inspired by Moore’s (1991) research on the “chasm” innovators found between gaining early adopters and attracting large numbers of users, and by Murphy and Edwards’ (2003) study on the “cash valley of death” between technology creation and commercialization. Most recently taken up by Klitsie et al. (2019) to assess how organizational factors contribute to it, and then deployed a design perspective to explore how the VoD can be overcome (see also, Barr et al., 2009).

To research our question, we adopted a design lens, which allowed us to examine the learning architecture employed by a business

school and a strategy consulting firm to teach strategy methodology replete with learning that avoids the VoD. The program is run with partners and their key account clients in the classroom, learning together. Our data are composed of 30 in-depth interviews of alumni of six iterations of the strategy program, as well as an intensive observation of one iteration by two of the authors. Our findings allow us to propose a generalizable architecture for executive education programs, which avoid the VoD for strategists. The paper is organized as follows: after reviewing additional background literature, we describe our research methodology, demonstrate our findings, discuss our results – including contributions to the relevant literature – and provide concluding remarks.

The valley of death in executive education

One reason that scholars have provided for why ideas perish in the VoD that separates the business school classroom and actual business is how teaching and learning have come to be structured in business schools (see, e.g., Pfeffer and Fong, 2002; Watson and Temkin, 2000). According to these researchers, business school faculty purportedly see themselves more as social scientists than as members of a professional body, and this translates to greater emphasis on scholarship rather than focusing efforts on the implementation of learning and application to practice.

Yet this set-up has not always existed. Though once berated for providing overly vocational training, business schools went on to overcompensate when, after WW2, they hired rigorous social science researchers; and so, it is now their scholarship that is criticized for being irrelevant to practicing executives, based on a misalignment of learning objectives at business schools as compared to competencies linked to managerial effectiveness, according to Rubin and Dierdorff (2009, 2011). Still, other scholars have suggested that for business schools, linking research with teaching enhances the skills students will gain to become lifelong consumers of academic research (Burke and Rau, 2010: 132). Despite that promise, scholars consistently observe widespread faculty reluctance to explicitly emphasize rigorous academic content in business education, which has been found to be particularly the case in short-term executive programs, wherein many faculty members purportedly perceive executives as more practically-oriented than academically-minded professionals (Lorange, 2002; Strebel and Keys, 2005; Barnett, 2007; Garvin, 2007). In the end, Rubin and Dierdorff's (2009, 2011) work has been challenged by Costigan and Brink (2015: 260) who demonstrate, "[t]hrough an analysis of the learning goals of 250 MBA programs[,] ... that learning goals are mostly in alignment with the competencies that lead to managerial success." However, on balance, Costigan and Brink (2015: 269) also admit that they would be remiss not to acknowledge that:

It is quite possible ... that a number of business programs are going through the motions of assurance of learning and assessment without making any significant change to required curricula. Maybe, programs are not really using learning goals to drive required curricula. This disconnect between goals and curricula may be another example of MBA policy makers "standing on the sidelines" (Rubin and Dierdorff, 2011: 158), tacitly accepting misalignment.

Unfortunately, it is difficult to assess, in larger format surveys, the alignment – real or perceived – of business curriculum and measures of managerial success, or, successful application of what was learned in the classroom beyond it.

According to critics, another reason for ideas dying in the VoD is the widespread use of traditional case studies (see, e.g., Bridgeman et al., 2016; Bridgeman, 2010; Chetkovich and Kirp, 2001; Chia, 2005; Collinson and Tourish, 2015; Contardo and Wensley, 2004; Currie and Tempest, 2008; Grey, 2004; Mintzberg, 2004; Podolny, 2009; Starkey and Tempest, 2009; Starkey and Tiratsoo, 2007). An alternative pedagogic format, evidence-based management education (Pfeffer and Sutton, 2006), has also been taken to have limited efficacy in terms of preparing management for non-routine situations in practice or operating in environments that are not evidence-rich or easily quantifiable: "this movement defines [the notion of] evidence narrowly and inflexibly, whereas problems in management can always be understood in different ways and from different perspectives" which "is likely to lead to a greater distancing of practice from research," according to Morrell and Learmonth (2015: 521). The authors tend to agree that "[i]f the assessment results indicate that the objectives are not being met," consistent with Costigan and Brink (2015: 274), then, as they put it, "genuine steps must be taken to revise the curriculum content or delivery methods" (ibid.).

Research also has compared the value business schools bring to managers with the purportedly higher value of law schools for the legal profession, engineering schools for practicing engineers, and medical schools for medics (Pfeffer and Fong, 2002; Bennis & O'Toole, 2005). To address these unfavorable comparisons, unsurprisingly, business school faculty have been actively seeking innovative educational architectures (c.f., Mintzberg and Gosling, 2002), especially those which attempt to enable learning that avoids the VoD (see, e.g., Kets de Vries and Korotov, 2007). Roos et al. (2004: 563) suggested that "playing seriously with strategy" would help to loosen strategy from its usual process constraints and thereby create space for change in strategy curriculum, delivery, and design. They proposed that "if you are striving for innovative strategy content, then start by innovating your strategy process" (ibid: 565). If so, to avoid the VoD, innovative learning architectures would be a reasonable way to go about this.

Design lens

Design was brought into management studies by Simon (1969, 1988) and was more recently popularized as pertaining to strategy by Martin (2009) and Knight et al. (2020). The idea that inquiry can be designed was proposed by Churchman (1972), so using design theory explicitly to ascertain how better educational architectures are devised is not new.

Similarly, design thinking and design practices are explicitly used to devise educational architectures, as was, for example, done by the design firm Ideo (2003). Indeed, program design is one of the criteria the influential *Financial Times* (2019) ranking used to assess executive education, accounting for 8.4% of the overall ranking – the same weight that is taken into account in the ranking for: "Aims achieved – or the extent to which academic and business expectations were met, and the quality of feedback from individual

participants to course commissioners.”

Design literature reveals a multitude of definitions and practices, which *a fortiori* also affects how design works in education. For example, Johansson-Skoldberg et al. (2003) found five different discourses of what they termed “designerly thinking,” or ways to describe what designers do in practice, each with distinctly different epistemological roots. In the same vein, Bason (2017), now the head of the Danish Design Center, surveyed differences in the design literature and concluded that, perhaps instead of offering one widely acceptable definition for design management or design as management, a multi-dimensional attitude toward design might provide better understanding. As Bason (2017, p. 39) put it:

I suggest that design can be viewed as: 1) a *plan* for achieving a particular result or change ...; 2) as a *practice* with a particular set of approaches ... for creating such plans; and 3) as a certain way of *reasoning*, underlying, or guiding these processes.”

All three aspects of this “design attitude” are relevant to ascertain the architecture of the program we analyze in this paper, where we interpret the original Churchman approach to explicitly attend to how inquiry is conducted in a classroom.

Surveys of buyers of executive education suggest that attending to the VoD is becoming an important aspect in determining whose expertise they will hire to deliver this service. For example, Charlton et al. (2005: 40) surveyed the sponsors of executive education, 61% of which agreed that research on “understanding the factors in organizational climate that influence how well participants can apply and transfer their learning from the programmes” should be a priority among business school researchers. A recent contribution to this line of research is Klitsie et al.’s (2019) who proposed that three organizational factors that contribute to the existence of the VoD are the organization’s design, departmental silos, and dissimilar innovation strategies. Those researchers subsequently identified three design practices that mitigate VoD encounters: materialization, user-centeredness, and holistic problem framing. These inter-organizational practices can be used to design executive education programs.

As we see below, the architecture of the program we researched deployed bespoke versions of these design practices to counter factors that contribute to the VoD.

A learning architecture to avoid the valley of death

As stated above, this paper reports research we conducted on an executive education architecture which reflects up-to-date, day-to-day business environments that strategists inhabit.

The program – co-defined, from the start, between the faculty of the business school and the internal think-tank of the strategy consulting firm – has been delivered since 2010. The think-tank recruits “natural groups” of participants (Chansler et al., 2003) comprised of partner-client actual relationships to attend the program. The natural groups which attend the program are dyads made up by the firm’s senior partners and their actual commercial clients¹. The two people in the dyad have histories engaging in actual strategy projects outside the classroom. In these projects, the partners from the professional services firm work with their senior client executives in strategy consultancy engagements.

This format enacts the Tavistock Institute’s views of the role social science plays in terms of the “social engagement of social science” (Trist and Murray, 1993) by enacting the dictum that “good theory supports good practice” attributed to Kurt Lewin (1947). It also manifests Churchman’s (1971) consideration of the architecture of inquiring systems as objects of design. In the architecture of the program we researched, all stakeholders – senior partners in the firm, their clients, and also the program’s faculty – are positioned as co-inquirers (McCulloch, 2009), learning together, albeit each having their own distinctive role in this co-learning and the resulting co-production of knowledge and human capital. The program participants are told explicitly that they are both “at” and “in” work when they are attending the program, and only “away from” the typical work setting. In the program, participants are learning and working in a novel setting, which, research suggests, helps them to critically reflect on their strategy work (Schön, 1983; Cunliffe, 2004). The program architecture not only mirrors how clients and partners learn to strategize at work, or what Argyris and Schön (1974) referred to as “reflection-in-action,” but also extends the loop of learning from single to double learning, or what Argyris and Schön (1974) referred to as “reflection-on-action.”

The natural pairing of consultants and their clients are the “dyads” that serve as “the unit of analysis” in our investigation. Our findings suggest that this co-learning and the co-production of shared knowledge is precisely the sort of educational architecture that helps participants to shepherd their newfound ideas, methods, and insights from the classroom through the VoD, rendering the investment in time and money worthwhile.

The long-range planning strategy tool that the program attempts to usher through the VoD is scenario planning. Scenario planning is an established management tool taught in many business schools (Sayers, 2010), especially in executive education (Blackler and Kennedy, 2004; Paton et al., 2014), in MBA programs (Bradfield et al., 2015), and leadership development (Kark, 2011). Scenario planning’s multi-decade longevity in practice is attributable to its utility as a flexible thinking tool (Cummings and Daellenbach, 2009; Greiner et al., 2003; Ramírez and Wilkinson, 2016; Rowland and Spaniol, 2015; Spaniol and Rowland, 2018). Scenario planning can be categorized as taking place in a series of stages, phases, or steps, which are typically iterative (Ramírez and Selin, 2014; Rowland and Spaniol, 2017). Scenarios are defined, according to Spaniol and Rowland (2019: 1), as having:

¹ Occasionally, the think-tank will also include a second executive from that client firm, but this is exceptional. "and designate this footnote after

a temporal property rooted in the future and reference external forces in that context; ... [they] should be possible and plausible while taking the proper form of a story or narrative description; and ... [they] exist in sets that are systematically prepared to coexist as meaningful alternatives to one another.

Scenario planning has been assessed as resonating with numerous theories of learning which matter to executives, including activity theory (Blackler and Kennedy, 2004), action learning pedagogy (Bradfield et al., 2015), games and “play” (Kark, 2011), experiential learning (van der Heijden, 2005), organizational improvisation (Crossan and Sorrenti, 2003), Bruner’s constructivist learning theory (Upham et al., 2014), Vicker’s learning and decision-making theory (Loveridge, 1979) embedded in Appreciative System thinking (Burt and van der Heijden, 2008), learning to frame managerial attention (Ramírez et al., 2013), and mutual learning systems (Robinson, 1992). Although research indicates scenario planning stimulates organizational learning (Galer and van der Heijden, 1992), there is still a paucity of scenario planning content in conventional management and strategy textbooks (Burt et al., 2006). This implies that partners and their clients, even those with an advanced education, may, at best, be only partially proficient practitioners of scenario planning without additional executive education.

Methods

Data include 30 in-depth interviews with past attendees of the executive education program. Interviewees include past and present partners from a major global consultancy firm (18 participants), their clients (9 participants), and individuals operating in an adjacent or “auxiliary” role with regard to the program (a previous program auditor, a senior partner and co-founder of the program, and a former-partner-now-client, three in total; none of which were counted as a partner or client). In the analysis section, partners, clients, and auxiliary interviewees are only identified by a number, which simply reflects the order in which they were interviewed.

In-depth interviews ranged in length from approximately 30 min to nearly 2 h. The shortest interview was 24 min; the longest was 1 h 56 min; the average interview took 35 min; the total length of all interviews amounts to 17 h and 8 min. Interviews were digitally recorded and subsequently transcribed, names of persons and companies were made anonymous, and then the original audio files were destroyed. The shortest transcription was 6 pages (word count: 2535); the longest was 36 (word count: 17,035); the average transcription length was 9 pages (word count: 3944); the total length of all transcriptions amounted to 267 pages (word count: 118,326). There were no meaningful differences in the length of interviews between clients and partners; while, interviews with auxiliary participants were approximately three times longer than those with other participants.

Three interviewers were hired by the research team, none had had a role in the program, and they conducted interviews. The consultancy firm, based on internal records of program attendance, compiled a list of 102 potential participants for our research, including participants who were no longer clients or no longer partners as of 2016. Of 102 potential participants, 39 partners (46% of those who participated), 57 clients (16% of those who participated), and 5 auxiliary members (80% of those participated) accepted to be interviewed. Thus, the overall participation in the study was 29% of the original list of potential participants (30 out of a list of 102 potential interviewees contacted).

The interviewers solicited potential participants through e-mail correspondence describing the study design and encouraging reply. Of the 102 invitations, we received 38 replies (37%). Of those 38 replies, 30 were successfully converted into full-length interviews (79%) while eight could not be scheduled or were unresponsive to multiple scheduling attempts (21%).

The authors adopted an inductive approach to data analysis, which unfolded in two steps. First, two outside, graduate-level research assistants made an initial assessment of the interview data’s robustness; second, convinced of the quality of these data, a formal coding scheme was developed to analyze data and prepare results.

In the initial assessment process, instead of choosing between assistants, the authors hired two candidates, and, unbeknownst to the assistants, they were set the same task to determine if they would deliver comparable findings. The assistants confirmed the usefulness of the results (95% or more correspondence in findings), while also creating a necessary barrier between proprietors of the program and the more objective results provided by outside assistance with no previous knowledge of the program.

Next, two of the authors analyzed each interview independently and generated recurrent themes individually. They subsequently met face-to-face to parse those general themes down into a set of specific codes, which they then used to re-analyze the interviews. After the results of open coding were compared in the face-to-face interactions, an additional round of axial coding was undertaken, based on the codes established in the previous (open) analysis. Then, in a final stage, after selective coding, the authors finalized the project’s findings and organized them for the results section. Data were thus coded in an accepted mode of inductive data analysis (Briggs, 1986; Weiss, 1995). In the end, the authors generated codes which characterized the architecture and assessed the impact of the program.

Additionally, while interviews have the advantage of providing reflexive accounts of personal experience, which is essential for this research, interview data can suffer from retrospective biases. To counteract this research concern, two of the authors – neither of whom was in any way involved with this program – directly observed the latest iteration of the program. Observation without participation in the executive education program allowed these two authors to test preliminary insights drawn from interview data without, and this is crucial, interfering with the educational experience of participants in the program the authors assessed. The two authors took field-notes, also in the inductive tradition (Corsaro, 1985; Emerson et al., 1995), capturing participant interactions that clarified findings from interview transcripts.

Findings and analysis

In what follows, we present our findings, which, for reasons of presentation, appear in three sections, each devoted to an aspect of

program architecture. The three sections are called “Paired Learning Structure,” “Live Case Content,” and “Group-level Co-Learning.”

Paired learning structure

In this executive education program, senior partners from the strategy consulting firm are paired with their strategy planning client (s) in the learning environment (see Fig. 1.).

Getting the “right” client to co-attend the program is, partners report, essential. About appropriate clients to invite, partner (3) stated:

I think finding the right client ... is extremely important, ... if somebody's ... all about the operational metrics, this program is not going to appeal to them, and you're going to do yourself a disservice by bringing that client to the program. So you do need to find somebody with a strategic bent of mind; ... our clients have the mandate to think long term, to think strategically.

The co-founder of the program (23), also a partner, affirms that partner's comment, stating:

That's right[,] ... the people who come to ... [the program] are ... key planners or people who, in the judgment of the leadership that sends them, are predisposed to scenario planning.

Thus, because the program is about scenario planning, getting clients that are strategically minded and key long-term planners is thought to be essential.

Next, according to participants, the “right” executive client should be neither too senior nor too junior. According to partner (10), the program is “not so much for senior clients;” instead, “[i]t is more for, let's say, mid-level clients: Director of Strategy, VP of Strategy, maybe leader of a small business” – adding, “I'm happy then to invite senior folks to the seminar but it is a lot of time and at the end of the day it's a little too tactical for them.” This position was reiterated by other partners, who said for example, that the right participants “are not check-writers, they're mainly members of ... corporate strategy departments” (4). A reason for this, partners report, is that the core of the executive education program is essential learning for mid-level executives tasked with the technical aspects of planning. In a frank but realistic dialogue, one partner (4) revealed:

No senior executive really, really cares about the technicalities of the tools. What they care about is how do these tools apply in real life, ... and if they are facing a major strategic decision, how can they use scenario planning to help them make better decisions, which is a different dialogue than describing the theory of scenario planning and all this which, you know, many senior executives don't have the time for.

A related barrier, the same partner admits, is time; senior executives may simply lack the time for education and related travel.

The “right” strategic planning clients will ideally also have a recently established relationship with the partner. The co-learning opportunity thus becomes a way to deepen that relationship. To wit, one partner (3) stated, “I would choose a client that I'm in an early stage” with, meaning “more the sunrise stage of the relationship rather than the mature, possible sunset stage of the relationship;” after all, “with sunset relationships, it's good for resilience ... and [to] keep in touch, but with sunrise [relationships], it can be hugely valuable.” On “value,” another partner (4) summarizes the point succinctly; invite clients with whom “the relationships have been enhanced, but not to the point that they have led to, you know, work.” In sum, strategically minded, mid-level executives, in the early stages of their firm's relationship with the consulting firm, are a near ideal participant in the co-learning training program.

In the end, regarding the executive education program, “[i]t's a different way of establishing a relationship,” partner (18) reflected; the client and partner learn alongside one another, it shows the consulting company's range, and, the partner goes on to say, “I mean I think [the consulting company] is pretty good about not putting, you know, too many direct competitors in a room” to ensure the learning environment is secure and that training produces value for client and partner alike.

The learning set-up we studied is intentionally oriented around improving post-learning implementation of ideas learned in the classroom by training the client and partner together – the implementation is an inherent part of the program, from the first minute to the last one. “[P]artners don't come by themselves,” one partner (13) confirmed, and “the client doesn't come alone” either; “the partner and the client come together.” Colloquially, this is referred to as the “Noah's Ark” formula by the program's co-founder (23):

[W]e have a client, together with the client officer, the partner or partner-designate from [the consulting firm], there at the event. So it's not like we have a bunch of orphan clients [at the training program] ..., quite the contrary. Our partners are engaged and side-by-side with their clients. So they [partners] spend two very intense days' hearing about specific issues that clients have and that is worth an enormous amount in terms of understanding the client and being to explore new consulting opportunities that might arise. There are both indirect and direct benefits that come out of the program every single year.

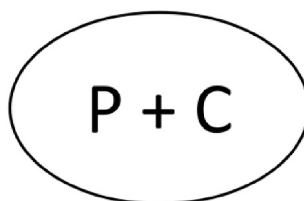


Fig. 1. Paired learning structure.

It is “a unique program,” according to one partner (9), in that “you learn together with your client as opposed to teach(ing) your client, right[?];” the “unique thing about this program, [is] that you together explore this [scenario] methodology.” Another partner (20) confirmed: “there’s a lot of value in learning together with our clients.”

Learning together creates a unique bonding opportunity, another partner (27) states, “there are other ways to learn scenario planning that are cheaper and just as effective, but that’s not the point. The point is ... to bond and get closer to a client.”

For this individual, the bonding through the learning is “the point,” more than learning scenario planning per se. This is an instance of what [Lang and Ramírez \(2017\)](#) saw as building social capital quickly through scenario planning. In the process of co-learning and, through it, bonding, the partner-client team gains a “common understanding” (14) and, in the learning environment, they operate as “pure peers, solving problems together,” which allows partners and clients to “interact in an unconventional way” (18). In sum,

by accompanying clients ... the partner gets insight into what the client needs are and develops their relationship with the client in a neutral, relaxed environment They roll-up their shirtsleeves and try and address important corporate questions in the presence of others who have like-minded purpose.

Live case content

Consistent with many executive strategy education programs, client-partner teams learn through case studies in clusters of three or four dyads, making up 6–8 learners per cluster ([Fig. 2](#)). In the traditional case model, lessons from case studies are drawn from the past. In this program, client-partner teams learn from emergent – what they call “live” – cases related to real-world strategic problems actually faced by one of the client executives and their firm in each group. So, several of these live cases are treated in parallel within a single two-day program iteration.

Partner-Client (P–C) dyads learn scenario planning by developing scenarios together, so the live strategy cases they bring to the program and which they study are not about the past but instead are primarily oriented to the future. Each client-partner dyad is put into a cluster with two or three other dyads; depending on the numbers in a given iteration there may be anywhere between three to five clusters, each dyad bringing their own case but together focusing on one live case lent to the cluster by one of the P–C dyads (see [Fig. 2](#)). While there is an argument to be made for learning from traditional case studies based on the past, learning from live cases set in the future has a few unique and beneficial qualities.

First, in live cases, the stakes are actual and tangible. This is because clients speak about their organization in real-time. Moreover, because participants all agree to confidentiality under the Chatham House Rule with regard to attributing what is said during the program and no direct competitors are present, clients are remarkably forthcoming about the critical uncertainties that they or their leadership face into the foreseeable future. The cases under examination, therefore, are not trivial, abstract, contrived, outdated, or hypothetical.

Second, the “owner” of each live strategy case is present in the classroom, learning alongside the partner, both of whom can dig deeper and more quickly into the core issues together. As the educational content is drawn from living cases provided by client strategists attending the course; partners, also with intimate knowledge of the client’s case, can directly support the client and help the client translate their individual case to the wider set of participants. In effect, client-partner teams learn together and present their findings together, too. The logic goes that, while in general, by working together at all, the partner and client can more quickly grow and enrich their relations ([Lang and Ramírez, 2017](#)) and the knowledge of each other, and that learning scenario planning together positions this co-learning in their common and shared future as strategic practitioners. Of course, adding the fact that they are working primarily on one of the clients’ particular strategy case content provides an even more intense growth or bonding opportunity for this core, focal live case dyad; whereas two or three other dyads working on this focal case will still learn with and about each other, and refer the learnings to their own respective live cases.

Third, live cases allow partners the opportunity to demonstrate attentive curiosity to the client’s case and dedication to supporting their strategy development. The process also presents partners with the challenge of generating custom-designed strategic insights for the client in the flow of learning together; and at a time and place when the client is open to the feedback and to explore strategy

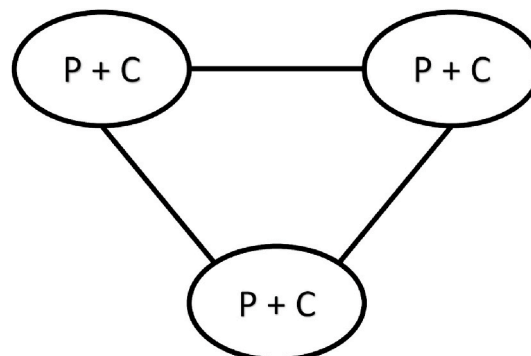


Fig. 2. Case content architecture in one learning cluster of three dyads.

options in what they consider to be a safe environment (Amado and Ambrose, 2001). The client is also granted the opportunity to assess the partner's attentiveness and ability in the process, as the entire process is a prototype for how future strategy-making together might unfold. On balance, however, partners are told – per instruction from the program faculty and the co-founder – to keep the learning space a neutral territory free from pressure to do or solicit future business.

At the program level, while supporting information and background knowledge may endure from session to session, the portfolio of live cases, wherein the skills associated with scenario planning are applied, is new every time, custom-generated from the participants themselves.

Using live cases in executive education is not new; however, with client-partner teams, live cases take on new significance and greater value can be harvested from their exploration. One reason for this is that competence is gained in using what for many clients and some partners is a new tool, which would happen with any live case, but in this framework, partners learn about their clients and clients learn about their partners in the process of exploring live cases together based on “real” issues. Another is that for those clients who are working on a live case which is not their own, they can see how the focal partner and client of the focal live case work together, giving them a benchmark with which to assess their own relationship with the firm and to assess alternative strategy-making collaborative modes.

For clients who “do not have a strategy background,” stated partner (4), “the program is a helpful way of thinking about strategic scenario planning – so, competence-wise, it's important;” however, “at the same time, bringing clients to the meeting and hearing what their real issue is, is also very important, perhaps equally important.”

Live cases are also instantly relatable for client-partner teams already invested in a shared business relationship. In contrast, individual participants reading historically-based case studies may have to very intensively work with their imagination to be able to determine how what they are learning could be applied to their current, specific business situation, even if specific time is allotted to that form of translation. This would hold even for client-partner teams learning from historically-based case studies. But because live cases involve the client's current, specific business situation, it is immediately and indelibly applicable. “[I]t's just a good idea to have a case in the room [the client and partner] can really relate to – making it real,” partner (10) remarked; still, the program is also “about practicing and getting into the [future-oriented] mindset.”

Live cases are themselves flexible learning tools for exploring the future through scenario planning. For example, working with a client in insurance, partner (3) recalled a live case that, “from a relevance point of view, it was absolutely spot-on ... building on what they were anyway doing themselves;” in this instance, the:

question they were asking is “What sort of business should we be in five/ten years down the line?” They have a forward-looking CEO who believes that insurance is increasingly less about risks and more about data, ... [so] we just asked ourselves, “What's our overall strategy, given where the industry could head?”

Partner (5) recalled a similar experience working with a client in a large tea business:

[tea] is changing very rapidly. How could we assess the future of the tea industry? What would be or how we would proceed for scenario planning, what would be the scenarios that would be feasible for tea in a specific timeframe?

Scenarios based on live cases can also include (or be based on) adapting to global/national transformations. Client (1) attended while “in the middle of redoing [their firm's] corporate strategy,” and “wanted to try and open the organization's eyes to the impact of various shifts happening in the world on the paper packaging industry,” which resulted in scenarios based on the behavior of various countries relevant to the industry. Another client (2) recalled, “we were talking about displays on iPhones and China, and how [the firm] might better penetrate the Chinese market and the Chinese manufacturing base,” which resulted in scenarios based on changes specific to China.

Live cases also help clients and partner to collaboratively articulate what partner (27) called “the question behind the question” in ways which lead to breakthroughs:

[T]he big breakthrough is when you get to the question behind the question. One of the things that clients have trouble dealing with, especially when it's a forward-looking big picture kind of problem, is to really identify what the problem behind the problem is. Before you start, you really probe and push and prod to really get at the heart of what the question is they want answered. From that groundwork you can start scenario planning on what they really ask you for, what the real the problem is, and what they really want.

Partner (8) and client (17), respectively, drew the same conclusion: live cases “if they're using their own cases, they generate new insight to their own business;” it “gave me a much better way of thinking about the technique because it allowed us to discuss things relevant to my industry.”

One explanation for the importance of live cases in teaching scenario planning is that effective scenario planning is contingent on marshalling both external as well as content knowledge. So learning scenario planning in groups of 3+ dyads as shown in Fig. 2 allows for both types of knowledge to become available to the learning. Scenario planning “methodology is ... content-based,” indicates partner (29); “you need to have good knowledge ... of what's going on in your industry and what your competitors are doing.”

In retrospect, client (28) offers this advice to future attending clients: be prepared. “[J]ust to prepare themselves” to share their live case so it becomes a ‘focal’ one as per Fig. 2; something that will be “good to discuss in this interesting circle there [at the University] – a strategic problem for which is probably suited to a scenario process,” but, also, to “prepare your boss” in order “to have the chance to implement.”

As we saw above, although all clients are exposed to live cases, not every client shares their own live case. Those working on another dyad's live case do pitch in and support the pair lending the focal live case study, but it is someone else's live case study they

are learning with in a first instance, not their own. According to partner (9), in the course of the program:

you pick one client out of a group of three or four, and you use them as a “use case.” So only one out of the four clients actually gets scenarios, their specific problem addressed; the others are just watching a problem being addressed that may or may not be relevant to them ... [t]hey still learn about the methodology, sure, but, at the same time, it may be a less satisfactory experience for them.

Group-level Co-Learning

Group work is an essential aspect of the program’s learning architecture. Client-partner dyads are instructed to work with other client-partner dyads, in clusters of six to eight participants, during the executive education program, as was shown in Fig. 2.

As total participation is usually 18 to slightly over 30 attendees, this means three to five clusters working and learning together (see Fig. 3, with only three clusters depicted for clarity) in any one program – the program has been run nine times at the time of this writing. Through initial presentation and discussion, groups learn a stepwise approach to scenario planning replete with theoretical justification for each stage in the process. The groups apply the approach to the focal live case throughout the program, gaining familiarity with the other clients and partners through joint application of the method. Faculty variously monitor and support the groups and their discussions, probing them occasionally, and redirecting when necessary.

Because scenario planning is worked on in groups, and is often facilitated by experienced external consultants, gaining first-hand experience with the method in the classroom mirrors application out in the field or back at the home organization. The client with the focal live case under development works closely with their partner on the case. Other client-partner pairs still work in teams together, but contribute to, what is for them, an exercise on someone else’s actual live case.

The approach which is taught in this program is deceptively simple: the groups learn together and apply together. Client (7) laid-out the structure:

So, this is theory, and then after theory, immediately, you know, how to practice this, how to apply this. Then another piece of theory, and then another example, a practical example, and then more application. Because in doing this together, you really understand “what are the key steps that you have to fulfil if you want, in the end, to have a successful scenario planning ... process?”

There is no pre-program preparation, apart from some modest, optional reading, which means clients, and first-time-attending partners too, do not know very much on what to expect; other than testimonials from past participants, modest background information on the program, and whatever word-of-mouth information they happen to glean from past participants. According to client (15), there is value to the demonstrated versatility of scenario planning:

It was more a kind of ‘from scratch’ exercise to be exposed to a methodology and to understand how it can be used across all sorts of different industries. I actually remember that we were in a work session ... where we were looking at the energy industry in Germany.

Partner (21) also found value in the different perspectives of group members:

By going through the same methodology with the group, I saw value in the perspectives of how others are reacting to the scenarios, how they are positioning the uncertainties, how they are tackling disruption that is linked to those scenarios.

“I think what we’re seeing is, it’s a great tool to just facilitate group dialogue about the future in general, regardless of the outcome

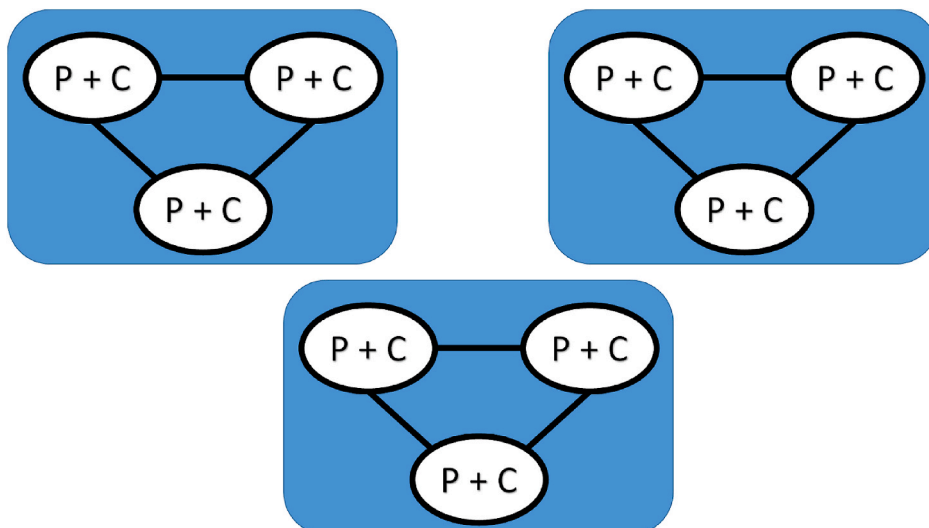


Fig. 3. Group-Level Co-learning work in clusters comprising the program. In some iterations there can be up to five clusters operating in parallel.

of the process,” stated partner (9), because “regardless of which scenarios you’re getting, you’re getting a good dialogue, maybe not just between you and your clients, but between the clients themselves and other stakeholders, I mean, that’s important.”

Partner (3) also deepened her/his understanding of client’s case by working on their own case in a group setting, in this instance, because the group was predominantly from the same business sector:

[W]e broke up into a couple of groups, and each group had a case, and in my group we focused on my client’s case with a couple of other [partners and] clients, other executives[,] ... one was from Turkey, ... but these were all large financial services folks so we were able to discuss our case in-depth.

As a core component of the learning architecture, no client is forced to volunteer their case, even if organizers may urge clients to consider offering their cases during the preparation phase. Having attended a number of these training programs, partner (30) stated:

I encourage partners to consider their clients as case studies during the program. I think it adds the most value for clients, if, you know, they’re show-cased and the wider program is brainstorming their specific situation. In that case, I think the client comes away from it feeling like they’d had a lot of attention, they’ve had input from a variety of sources, you know, [the consulting firm] has kind of given them the maximum they can give them.

In sum, to maximize relationship-building among client-partner teams, the partner urges the client to share their live case in the course of group work.

Discussion

Based on interview and observational data, and analyzed through a design lens, we have provided a view of a learning architecture whose primary function is to avoid the VoD in executive education (Barr et al., 2009; Kets de Vries and Korotov, 2007; Klitsie et al., 2019; Ramírez et al., 2011).

The architecture brings together natural working groups from the real world of strategy-making into the classroom to learn together and co-produce shared knowledge – in this case, corporate strategists who are clients of a strategy consultancy and partners of the firm who are strategy consultants. This architecture brings their work out of the office and into a shared learning environment – it does not invite them to “leave their work behind” in their respective offices. Instead, program design requires learners to reflect on their work rigorously, so that they can improve on their shared, co-learning partnership of joint strategy- and knowledge-making, so that it can continue to be applied thereafter, in subsequent future engagements.

The evidence we analyzed, based on in-depth interviews of participants from six different iterations of the program and direct observation of a further iteration, demonstrate the following key architectural characteristics which such designs can emulate:

- *Paired Learning Structure*: This paired structure of senior clients and experienced partners learning together is the core learning unit, mirrors real world strategy-making relationships, and entails a natural working group;
- *Live Case Content*: Client-partner pairs explore “live” cases based on existing strategy challenges, meaning that the course content is immediately relevant to participants; and
- *Group-Level Co-Learning*: Structuring client-partner dyads to work in clusters with other client-partner pairs showcases the range of clients and industry knowledge available in the consulting firm, and it extends the peer community which validates the learning.

The research confirms empirically that there are designed ways to avoid the VoD as the learning architecture we studied avoids the three, distinct characteristics that Klitsie et al. (2019) identified as contributing to the VoD. Our empirical contribution in this manner demonstrates that the documented learning architecture was designed to:

(a) Avoid “organizational silos,” which is a common characteristic of executive education which is sponsored by firms to train their strategists in groups; because the strategists in the executive programming are drawn from the same organization’s businesses and departments, with the organizational structure remaining unchanged. Instead, here, by intentionally combining learners across multiple organizations and multiple organizational sectors in order to co-learn together the silos are avoided.

(b) Avoid “complicated mechanistic” arrangements in the learning environment, which is a common characteristic of “in-house” educational programs for strategists because in-firm hierarchy translates into the learning environment and contributes to short-circuit open and candid interactions during the learning process. Here on the contrary, by intentionally regarding everyone as an equal, if distinct, co-learner in the structured learning environment, a more organic and less mechanistic learning format is made possible.

(c) Avoid “dissimilar innovation strategies” preventing implementation, which is a common malady which strategies suffer after training in that different or autonomous units within an organization or in relation to different decision-levels do not or cannot align their priorities. In the program we studied, the learning architecture intentionally creates teams of cross-disciplinary strategists and clients, particularly when several dyads learn together, which helps them to understand the differences and with that understanding to better align the immediate innovation priorities and render this alignment actionable.

These design features manifest the recommendations that Klitsie et al. (2019) proposed to avoid the VoD. First, what they termed “materialization” involves rendering otherwise vague possibilities of the future visible (Klitsie et al., 2019: 36). In this program, learning in the classroom enacts how the scenario planning can actually occur beyond it. The classroom “test-run” is like test-driving a car before buying, owning, and operating it on a day-to-day basis. Second, what they termed “user-centeredness” involves “framing

projects around user needs instead of processes and numbers” (Klitsie et al., 2019: 37). This is achieved in this program’s architecture by bringing the user-central consideration – chiefly, the consulting relationship – into the center of the learning through the use of live cases. Of course, this works best for those whose live case is the focal center of attention and learning, as our evidence suggests; however, the other dyads, per the program architecture, still learn from their peer’s live cases and, we find, discuss their own consulting relationship in light of the focal live case and, thus, benefit as well. In the end, the program allows all participants to “embrace ambiguity and complexity” and engage in what Klitsie et al. (2019) term “holistic problem framing” by learning and using long-range planning tools, in this case, the scenario planning method, in natural working groups drawn from the real world of strategy-making situated in the classroom context (Ramírez and Wilkinson, 2016).

Conclusions

As strategy is a “precarious profession,” strategists, to remain relevant, must regularly invest in new skill development and cutting-edge education (de Geus, 1988; McKenna, 2006; Nordqvist and Melin, 2008; Paton and Wagner, 2014; Whittington, 2019). And yet, scholars ask how much investments in executive education are ultimately unproductive (Charlton, 2005; Doh and Stumpf, 2007; Kesner et al., 2003; Long, 2004). We build on Klitsie et al.’s (2019) views by finding that the architecture of strategy learning environments can be, if well designed, of vital importance for strategists, their employers, and the business schools they collaborate with, to advance their understanding of long-range planning tools and to improve the return on investment once strategists return from the classroom.

The learning architecture we studied brings together clients and partners of a strategy consulting firm to co-learn and apply scenario planning methods in a custom-designed education program (Churchman, 1971; McCulloch, 2009; Schön, 1983; Argyris and Schön, 1974). We found that it is by design that this program’s architecture is centered on co-learning as a way to keep strategists relevant, not only by enriching the structure and the quality of the relationship, but by producing valuable strategic insights that are shared “here-and-now” as they prepare for “there-and-then, later on” application in subsequent working relations after the program ends.

Additionally, by using live cases, as compared to traditional case studies (Bridgeman et al., 2016; Chia, 2005; Collinson and Tourish, 2015; Mintzberg, 2004; Starkey and Tempest, 2009), the scenario planning tool is actively applied in the learning environment, which, we contend, encourages implementation later-on, in the real-world of business relations, by those strategists who have applied the method on a live case during the program. We found that the group learning environment also encourages implementation in that it provides an opportunity to benchmark novel strategy-making, according to client (15), who stated “to be in contact with other clever counterparts - people that face similar projects as [compared to] yours - is an opportunity to benchmark, to share challenges, opportunities, and different views.” While these aspects worked together with each other as a system in the program we studied, the extent to which any one of these independently increases the odds of avoiding the VoD remains an empirical question fit for further analysis.

As previously noted, while motivated by researching practical problems faced by business schools and the executives and organizations which they serve, this paper also addresses a gap between two literatures:

First, based on a conceptual framework implicit in literature on the postures that business schools take with regard to students as either a partner or a client (Armstrong, 2003; Ferris, 2002; Franz, 1998), our empirical evidence demonstrates that both roles, student-partners and student-clients, can inhabit the classroom simultaneously to positive ends in the context of the learning architecture we studied.

Second, once our gaze is adjusted to see students as both clients and partners, the concept of co-produced learning and knowledge is facile to foreground in an educational setting. This is consistent with the knowledge-intensive service firms identified by Larsen (2001), and those dating back to Lovelock and Young (1979), and with similar benefits as those outlined by Bettencourt et al. (2002: 104-5), namely, the development of customized and co-produced services and product solutions to satisfy client needs, chief among them for the purposes of this study, being “joint planning for managing successful partnerships.”

The link between these two currents in the literature both framed our argument and justified our inquiry, which, we contend, constitutes one of the basic contributions to scholarship of this article beyond the primary thrust of the article, which was to provide a blueprint of the educational enactment of this architecture based on practical experiences in providing a higher education.

We, therefore, recommend that companies, seeking to enhance returns from executive development investments, and business schools, seeking to produce more value for their participants, emulate this architecture, and selectively modify it for their unique educational needs. In principle, this architecture could accommodate many long-range planning and strategy tools (see, e.g., Vuorinen et al., 2017; Spaniol et al., 2019, for a list of potential candidates). In the end, partner (9) may have summed it up best:

[this form of educational architecture] deepens our relationships ... on a couple different levels. You spend two days off-site with the clients; that’s not common, right[?]. Normally, you meet during the day, in the office, maybe [over] dinner, but travelling together, out of both of your comfort zones, it builds a deeper bond. I think that is useful. I think the co-learning, that you both are learning together and exploring something together, is also interesting. It positions you better to talk about big strategic future issues, so that, later, as a continuation of the program, the client asks the partner for advice. We know we have the expertise as a firm to deliver. That matters.

As the practice of professional service firms teaming-up with universities continues to grow, the resulting collaborations that emerge will increasingly establish themselves as leaders in strategy development and long-term planning. Our final recommendation is that executive education providers need to put as much attention on what happens after the program, and during the program, as they

do when they prepare for its success before it occurs. In other words, just as research, teaching, and design are vital inputs to a program, activities that enable enacting the pedagogical designs that avoid the VoD are as important if the investment in executive learning is to be a holistic success.

CRedit authorship contribution statement

Rafael Ramírez: Conceptualization, Methodology, Validation, Formal analysis, Writing - review & editing, Visualization, Supervision, Project administration, Funding acquisition. **Nicholas J. Rowland:** Conceptualization, Methodology, Validation, Formal analysis, Investigation, Writing - review & editing, Visualization. **Matthew J. Spaniol:** Conceptualization, Methodology, Validation, Formal analysis, Investigation, Writing - review & editing, Visualization. **Andrew White:** Conceptualization, Validation, Writing - review & editing, Funding acquisition.

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