

Allegory Applied for Organizational Learning and Foresight. Corporate Strategic Challenges Reflected in Shakespeare's Wholeness Model

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Abstract

Shakespeare's allegorical works can be employed to reflect narratives of learning organizations for organizational learning and foresight. In four strategic sessions with companies in the logistics industry, we made an experiment with the application of Shakespeare's allegories to relevant business issues. We worked out one case study in detail, demonstrating how the allegorical theme relates to the business challenge, and how the participants respond to the analogies to learn and anticipate. The allegorical reflection exercise is a cognitive process, in which the participants use allegory as a tool to identify and probe the causal connections between 1) their decisions, attitude or preoccupations, and 2) their professional challenges and strategic decisions. Our article explains the positive impact on the inquisitiveness of the two companies as learning organizations. We present allegory as a practical tool for boards and managers to mirror complex organizational issues to learn, adapt, and anticipate sustainable futures.

Keywords: Narrative foresight, Action learning, Strategic foresight, Learning organizations, Narrative inquiry, Wholeness

1. Introduction

The central thesis of this article is that participation in an active reflection of Shakespeare's allegories to strategic challenges inspires board members and teams in organizations to gain a 'reciprocity of perspectives' (Wagner, 2018, 502) and recognize an analogous pattern in their challenge, which enables them to:

- 1) integrate views,
- 2) perceive risks,
- 3) come to a fuller understanding of their challenge,
- 4) And anticipate decisions with a positive lasting impact.

Building on the work of futures scholars who have stressed the importance of narrative approaches for futures thinking and strategy development (e.g. Cagnin, 2018; Floyd 2008; Fuller & Loogma 2009; Inayatullah 2004, 2010; Li 2014; Liveley et al. 2021; Lombardo 2017; Milojević & Izgarjan 2014; Milojević & Inayatullah 2015; Miller et al. 2015; McDowell 2019; Raven & Elahi 2015; Slaughter 2011), we focus on the function of allegory in narrative foresight and its application for the benefit of organizational learning and strategic foresight. As allegory conveys a meaning not explicitly delineated in the narrative, and without bluntly stating an intended moral, we claim that the application of allegory forges plural perspectives on the present and their possible impact on alternative futures.

Inspired by the work of Shakespeare scholars on allegories and metaphors, cultivation, and sustainability (cf. Brayton & Bruckner, 2016; Egan, 2006; Garber, 2004; Martin, 2015; Scott, 2014), we test the hypothesis of Casteren van Cattenburch & Duijn (2019) that 'Shakespeare's allegorical pattern enriches the narrative strategy for learning and anticipating sustainable futures.' We work out a case study to demonstrate how the application of allegory helps organizational leaders and team members to collaboratively reflect on:

- 1) their mutual roles and competences,
- 2) work processes in their team or department,
- 3) relationships in networks, the market and/or societal context in which the company operates.
- 4) The reflection exercise inspires board members and teams to gain a ‘reciprocity of perspectives’ (or an exchange of viewpoints) by
- 5) suspending individual presuppositions, which are based on past experience and ideas of the future,
- 6) and opening their minds to a more holistic view, which joins past and future together.
- 7) The action of looking back and forward at the same time – through an anticipated future and a felt reality – allows a degree of reflection, a shift of perspectives, of movement, and of speculation (Empson, 2020, 14).

2. The need for organizational learning: strategic foresight

An organization’s present and future effectiveness and viability are largely determined by its capability to initiate, manage, and integrate learning and development processes. In an increasingly complex business environment, ‘companies need to reassess their strategic choices on a regular basis’ (Weissenberger-Eibl et al., 2019, 1). Successful organizations facilitate the learning of their members to continuously transform themselves and anticipate their futures: ‘When someone becomes more capable at anticipation, they become better at using the future to understand the present’ (Cagnin, 2018, 25; Miller 2006, 2007).

2.1 Organizational learning and anticipation

Theories about learning often address the distinction between individual and collective learning as well as the connection between them. In this paper we focus on collective learning. The most prominent collectives in society are organizations. Daft and Weick (1984: 285) define organizations as ‘open social systems that process information from the environment.’ The processing of information and applying it as an asset to perform can be acknowledged as organization learning. Moingeon and Edmondson (1996) reviewed different perspectives on organizational learning. Based on their review the following aspects of organizational learning can be identified: encoding and modifying routines, acquiring knowledge useful to the organization, increasing the organizational capacity to take productive action, interpretation, and sense-making, developing knowledge about action-outcome relationships, and the detection and correction of error.

The value of organizational learning is often defined as the question how to capture, store, transfer and disclose newly created knowledge for future use (Duijn, 2009, 184). For many organizations, knowledge and its management are perceived as vital deemed necessary for their survival, development, and performance (Hislop et al., 2017). How to organize this knowledge management may be an organization’s ‘holy grail’ because it assumes the capacity to deliver relevant knowledge for strategic decisions. Kwan & Balasubramanian (2003, 204) define knowledge management as ‘setting up an environment that allows workers in organizations to create, capture, share, and leverage knowledge to improve performance.’ Here, knowledge is perceived as a ‘tangible’ asset for the organization’s capacity to perform and deal with contextual dynamics. Spender (1996) argues that knowledge becomes tangible in the language and practices that are understood, shared, and communicated to other members of the collective they belong to, such as communities or organizations.

Organizations are continually interpreting the dynamics in their external environments, whether it be new consumer preferences or societal needs. Daft and Weick (1984) discuss how organizations develop capacities to analyse and interpret their environment. Based on two capacities, assumptions about the environment and organizational intrusiveness, they distinguish four types of interpretation modes performed by organizations, referring to the organization’s relationship to its environment (see Daft & Weick, 1984, 288-9).

For our application of allegory to anticipatory strategic decision-making, the enacting organization is interesting because it presupposes an active ‘intrusion’ into the environment to explore appropriate responses to its dynamics. Enacting organizations experiment, test, stimulate and adopt new viewpoints. Their strategic approach involves actively constructing a conceptual framework, imposing it on the environment, and reflecting on the interaction between these entities (Brown & Duguid, 1991). But in an increasingly complex, uncertain, and changing world, constructing decisions, based on the best possible predictions, might not be ‘the best way to arrive at the best decision’ (Miller (2006, 15). Miller (2007, 347) therefore advocates enhancing ‘futures literacy: the capacity of thinking about the potential of the present to give rise to the future by developing and interpreting stories about possible, probable and desirable futures.’ Like language literacy, this ability is acquired by going through a learning-by-doing process.

It challenges the ‘implicit and explicit anticipatory assumptions we use to think about the future’ and helps its participants to make strategic decisions in contexts of ambiguity, in a coherent and systematic way (Cagnin, 2018,

525). Of course, these anticipatory assumptions add to the knowledge already existent in the organization, serving as a vital resource for its survival.

Through reframing (Laws & Rein, 2003), organizations can overcome potential future discontinuities between their environment and their functional structure. Through questions like ‘Do we (still) do the right things?’, ‘Does something have to change and if so, what, and why exactly?’, an enacting strategy examines and mediates the discrepancies that organizations experience because of this reflection process.

2.2 Strategic foresight: structured and critical use of imagination

Complex systems such as multinational companies, may operate in patterned ways but their interactions are continually changing. Because of this growing complexity, companies need more than strategic planning tools: They need ‘decision-making systems that can learn and adapt rapidly rather than optimizing systems that cannot’ (Weissenberger-Eibl et al., 2019, referring to Ackoff, 1981, 357). Following the principles of strategic foresight, such strategic management requires a longer and structural understanding of change within a complex context, thus expanding the perceptions of strategic options or choices available to the organisation, before strategic decisions are made (Bezold, 2010, 1513). It focuses on continuous improvement through a design-oriented and participative approach that provides all stakeholders with an opportunity to take part and frames the process as a learning journey (Milojević & Inayatullah, 2015, 158). This approach therefore demands the ability to reframe strategies and explore alternatives towards greater innovation in a structured, analytical, and critical way (Cagnin, 2018, 527).

Strategic foresight requires imagination: the capability to think outside the box and into the future to see the bigger picture. Science-based creative thinking enriches the context for decision-making and develops a ‘leadership cadre that is more sensitive to changes in the external environment’ (Bentham, 2014, 88). ‘To see the bigger picture’ suggests the possibility of an existing larger coherent frame, or the idea of ‘wholeness’, as architect Christopher Alexander (2005) since the 1960s has sought to understand. His theory of wholeness recommends conceptual and practical ways for understanding how things belong together: Strategists, futurists and decisionmakers need an analytical grip on major external developments, the contextual dynamics, and their implications on the organization’s line of business.

In the next two sections, we explore how metaphor and allegory can stimulate, guide, and substantiate this analytic process, and how the idea of wholeness in allegory welcomes multivocality and subjectivity to gain structured understanding of diverging viewpoints.

3. Theoretical Frame: narrative-driven methodology

3.1 The use of narrative and metaphor in foresight and organizational learning

Throughout history, people have used narratives, symbols and metaphors to connect with each other and find shared meaning (e.g., Inayatullah, 2004; Palmer, 2014; Raven & Elahi, 2015). Milojević & Izgarjan (2014, 51) explain how underlying myths shape national identity and use constructive storytelling as an educational practice and tool for the transfer of alternative worldviews. Milojević and Inayatullah (2015, 162) analyse narrative foresight as an ‘evolving pedagogy: a process that gives primacy to story and uses narratives to make specific strategies for change more viable.’

Judge (1993, 275-6) and Puschmann and Burgess (2014, 1701) see metaphor as ‘guiding imagery’ that is vital to technological development ‘to make sense of novel and abstract phenomena’ and as a useful instrument in strategic foresight and futures thinking. Liveley et al. (2021) demonstrate that narrative-based creative practice can engage people to shift patterns of thought, practice, and behaviour, ‘combatting “locked-in” future narratives and opening up diverse and unanticipated possible futures’ (Milojević & Izgarjan 2014; Palmer 2014). They argue that working with narrative tools enhances futures literacy, the ‘capacity to explore the potential of the present to give rise to the future’ (Miller, 2007, 347).

The importance of narrative and of metaphor as sense making resources for organizational learning is highlighted by several scholars (Abolafia, 2010; Brown, 2000; Brown & Humphreys, 2003; Christianson, Farkas, Sutcliffe & Weick, 2009). To build understanding of a systemic issue like sustainability, Gearty et al. (2015, 62) note the potential of combining ‘Narrative, analytical and participative approaches to create a robust, valid basis for learning’. Weick (1995) argues that narrative may be used as a device for making sense of ambiguous organizational situations.

Sensemaking is the process through which people work to understand issues or events that are novel, ambiguous, confusing, or in some other way violate expectations (Maitlis & Christianson, 2014, 58) and ideally, find common ground through labelling and categorizing experiences and events (Weick et al., 2005). It is through the sensemaking process that organizations reflect upon knowledge and store that knowledge in the organization’s collective memory.

3.2 The potential of allegory for futures thinking and organizational learning

3.2.1 Archetypal structures

Judge (1993, 286) warns that the ‘use of metaphors needs the discipline of modelling’. A structured observation includes causal connections, and metaphor is a tool to identify and probe these connections: it ‘activates links to an array of ideas, including physical descriptors as well as scenarios, expectations, and schemata’ (Ritchie, 2004, 274).

To anticipate organizational problem structures (based on the work of the pioneers of systems thinking such as Forrester, Meadows & Meadows, Maturana & Varela), Sente (1990) and Sterman (2000) call for a deeper understanding of patterns of behaviour in organizations that have a tendency of recurring. Scholars recognize these problem structures as ‘systems archetypes’ (Li & Lin, 2011; Egmond & De Vries, 2011). They define the most common ‘systems archetypes’ and explore how situations with unwanted results or side effects can be mapped to the common behaviour models. Applying the principles of systems archetypes and corresponding values systems in organizations, problem solvers can diagnose a situation and plan a recovery – or, ideally, learn and proactively steer away from recurring problems by ‘strengthening the mutual cohesion of values’ within an ‘integral worldview’, which is represented by the archetypal pattern of Van Egmond and De Vries (2011, 865). Their pattern represents the whole of adversative or complementary orientations, schematically rendered as a crossed circle. Positioned in the figure, individual people ascribe more value to certain parts or quadrants of the integral worldview than other parts; such parts can be considered as (individual) worldviews:

Figure 1 Human value orientations (Van Egmond & De Vries, 2011, 858):

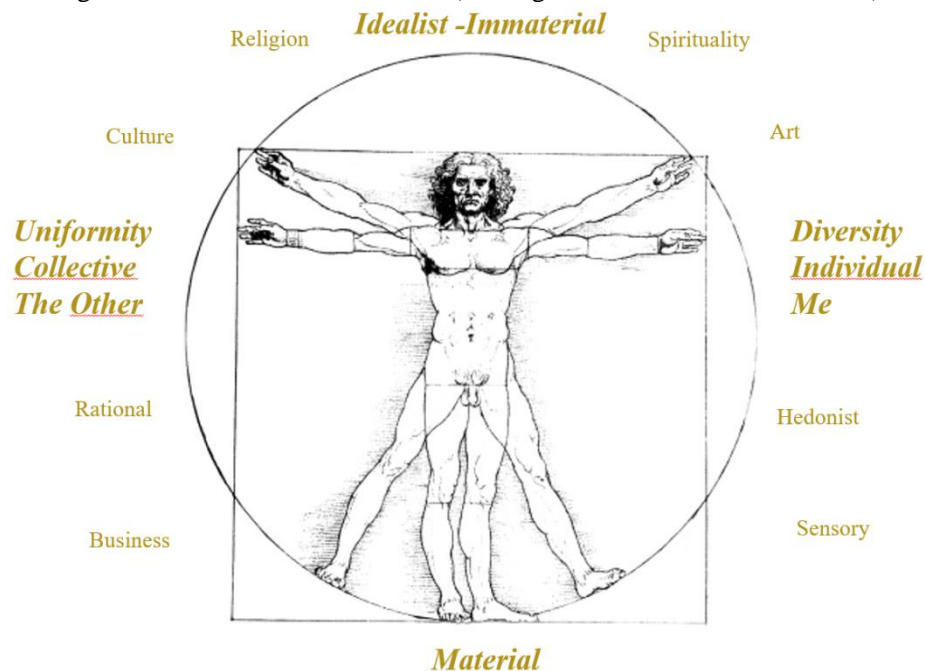


Figure 1 Human value orientations (Van Egmond & De Vries, 2011, 858).

Van Egmond and De Vries demonstrate that too much focus on one value orientation leads to (centrifugal) one-sidedness, clashes with (contrasting) world views, and perversion of value orientations through the periphery of the circle – occasioning situations of unsustainability. Conversely, articulation of the centripetal forces (directed towards the centre, symbolical for mutual respect, understanding, harmony) enhances consciousness and forges sustainable decisions.

Archetypal structures are at the basis of allegory: a form of literary imagery in which the metaphor is extended throughout the piece, and objects, persons, and actions in the text allude to meanings that lie outside the text (*OED*, allegory, *n.*, 1 & 2). An allegory is a story with an emblematic meaning, built on an orderly and recognizable structure. Frye (1957, 90) contends that allegory is a ‘contrapuntal technique’: It is based on an internal structure or pattern that presents each of the images both separately and in combination. This usually complex, combined action reinforces and comments on the structures of the individual images, while the poet either explicitly indicates a relationship of his images to examples and precepts or leaves it to the reader to discover such relationships and make sense of them.

Referring to the archetypal pattern of Van Egmond & De Vries, Casteren van Cattenburch (2017, 28-9) identifies an archetypal pattern that grounds the allegories of William Shakespeare. Character/ textual analysis of Shakespeare's plays reveals similar tendencies within the allegorical pattern, which encompasses the multivocality and ambiguity of the allegory (Casteren van Cattenburch, 2015; 2017). We claim that this pattern can be used as a metaphorical 'relief map' for ethical mirroring exercises regarding questions of sustainability and organizational learning.

3.2.2 Wholeness: the basis of Shakespeare's allegorical pattern

One of the reasons why Shakespeare's pattern works to raise consciousness is the fact that it represents wholeness: 'The quality, state, or condition of being undivided, or of having all parts or elements properly combined or connected; unity, completeness, fullness, perfection' (OED, n., 2.a). 'Wholeness' in Shakespeare relegates to the Aristotelian whole (as sustained in the ancient tragedies), which has 'a beginning and a middle and an end' (Aristotle, 2000, 1450b27). It is the principle that 'what we perceive in the theatre can be referred to a 'world', i.e. a totality' (Lehmann, 2006, 22). A situation is part of a whole – the plot – that is a causal chain of actions, and it consists of diverging viewpoints, complementary and contrasting forces which the characters cannot or do not want to see. Balance of these forces can be found in the 'Golden Mean': the centre spot between the two extremes of the value scale (cf. Aristotle, 2000, VI; 2011, II.i).

To describe 'wholeness' in Shakespeare means to map out the value pattern: the movements from light to dark, from good to evil and vice versa, yet without moral judgment or rejection and with an open-minded responsiveness to human nature, the 'knot of polarities' as a metaphor for the lives, minds, and actions of people. As Shakespeare's 'whole' includes multivocality and subjectivity (Casteren van Cattenburch & Duijn, 2019, 115-7), multiple interpretations remain possible: 'Initial assumptions (about what is necessary to solve or deal with) are challenged and overturned by characters with different interests and backgrounds.' When applying the allegory for sustainable decision-making and alternative futures in organizations, it is crucial for the board/team members to see the world of the allegory as a 'surveyable whole', as Lehmann (2004, 105) explains: (...) 'not the walled-off fictional totality, but a world open to its audience, an essentially possible world, pregnant with potentiality.'

Applied to strategic organizational learning challenges, Shakespeare's archetypal pattern has a similar working. In the allegorical mirroring exercise of Casteren van Cattenburch & Duijn (2019), the plot and the characters of the play are allocated to one specific learning issue and its stakeholders. Their exercise is retrospective: It is based on an existing learning history and shows the potential of the employment of Shakespeare in actual and future organizational learning. We aim to tap this potential and have therefore employed Shakespeare's wholeness pattern as a mental model in the articulation of values and value drivers in the management and decision-making processes of four companies (in the field of logistics, IT, and finance). We grounded these four workshops on the same principles and process and found similar results. To elucidate our method in this article, we worked out one of them in detail.

4. Empirical work

4.1 Methodological principles

Narratives are 'enablers to enact reality' (Patriotta, 2003, 352) and so anticipate learning for future realities. According to Miller et al. (2018, 53), one use of anticipation is as a 'means to imagine how actions might play out in the future'. The discipline of anticipation (DoA) provides people with tools to organically deal with complex problems and systems to use the future to understand the present, thus improving their futures literacy (Miller, 2007, 360). With our plight for the use of allegory for anticipatory decision-making processes in organizations, we build on the principles of Anticipatory Action Learning, which stresses the importance of inquiry, democratic participation, action, decision-making, and learning (cf. Stevenson, 2002; Inayatullah, 2006). We designed our process to facilitate these conditions to support the European team of logistic directors and operational managers (approx. 25 people) of a globally operating logistics firm that wanted to explore its future challenges and ways to deal with them. We used Cagnin's (2018, 525-7) process descriptions of Futures Literacy and Design Thinking to order the phases we took our participants through:

- 1) Inquiry: in our preparatory talk, we asked the logistics director to think about their predictions and hopes.
- 2) Democratic participation:
 - a. We challenged the participants (of the workshop) challenged to leave behind their image of the (probable/desirable) future, to dive into the allegory, and from that experience take new experiences to a new image of the imaginary future.
 - b. In-depth discussions of these experiences enhanced mutual understanding of different perspectives.

- 3) Learning and decision-making: Participants examined how anticipatory assumptions influence our understanding of the present: they returned to the initial decision-making context to test new questions and identify choices.

Figure 2 Futures literacy overall process (Cagnin, 2018, 526):

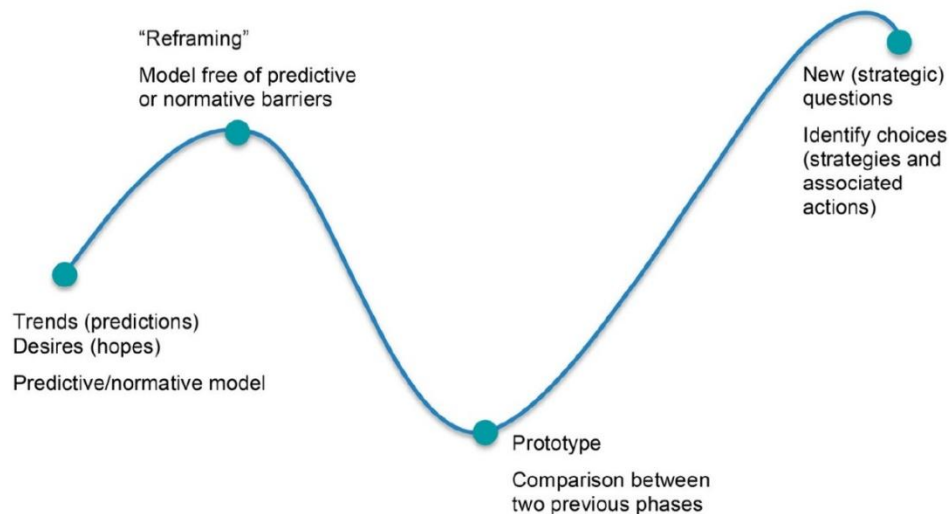


Figure 3 Futures literacy overall process (Cagnin, 2018, 526)

To realize our workshop as part of their multi-day strategic programme, we took the following steps:

- 1) Preparatory talk with the logistics director responsible for organizing the multi-day strategic programme in which we defined the learning issue,
- 2) Analysis of the learning issue and matching of the allegory, force field analysis and archetypal framing,
- 3) Presentation of and invitation to the allegory, followed by experimental role-playing based on the allegory, performed by the team members, directed by a professional director,
- 4) Informal discussion following the performance, and an evaluative talk a few weeks after the strategic session, to obtain responses to the experimental role-playing. The central questions were: How did the allegory/metaphors help the company to learn for strategic foresight? What was its contribution to 'imagine the future' and 'see the bigger picture'?

4.2 The application of Shakespeare's *Henry V* for labour shortage response strategies of a company in the logistics industry

We organized this workshop for the European team of Logistic Directors and Operational Managers of a global, family-owned logistics and transport company.

4.2.1 The organizational challenge and choice for a corresponding allegory: Shakespeare's *Henry V* as interpretative scheme

In our preparatory talk, the European Logistic Director indicated that culture would be an important topic on the agenda of their multi-day strategic session:

"Due to the rapid growth of the company, in favourable economic times and a tight labour market, it is not easy to find enough logistics employees, and keep them. Several difficulties ensue: an increase of workload per person, loss of focus and meaning, burnouts. Given these challenges, our main question is: How to keep our company's mojo working?" (transcription; recorded on 25 July 2018)

We suggested to mirror their situation to the allegory of *Henry V*: one of Shakespeare's history plays, which covers events during the Hundred Years' War, immediately before and after the Battle of Agincourt (1415). Despite heavy losses and hardship, the English win a major victory against the French. What happens at the decisive moments in the battle? Which parallels could facilitate learning in the process of shaping the company's strategy for the future?

Plot

Henry has set off to war against France. After months of hardship, the English soldiers are in poor condition, disheartened by sickness and foul weather. The two armies prepare to fight. The evening before the battle, Henry tours the camp in disguise, finding out what his men think and knowing he is outnumbered by the French. It leads him to consider the heavy responsibilities of kingship, and to think of a smart strategy to conquer the enemy (recent heavy rain made the battlefield very muddy, which would obstruct the French soldiers in full plate armour but benefit the English archers and longbowmen). Henry then rallies his army with the famous St Crispin's Day Speech, in which he motivates them to rely on their own strength and to take pride in their English perseverance and bond. The English win an overwhelming victory.

This allegory addresses the balance between the two Aristotelian extremes of the virtue ‘self-reliance’, its deficiency expressed by the vice ‘depression’ or ‘stagnation’, its excess by the vice ‘arrogance’ (cf. Aristotle, 2011, II.1):

Figure 3: Aristotelian value scale in *Henry V*:



Figure 3: Aristotelian value scale in *Henry V*

4.2.2 Preparing the workshop

Prior conditions and analogies between case and allegory

To enhance the theatrical experience for the participants, we hired an experienced director to help us prepare a performable *Henry V* – without losing the power of the allegory – and give stage directions during the workshop itself (held on 11 January 2019). Time restrictions dictated a maximum of 30 minutes for the role-playing, so we had to make a compilation that should allow us sufficient time for repeating scenes, reflection, and discussion. We started our preparations by articulating parallels between the business challenge of the logistics company and the allegory:

Table 1: Case 1, allegory & business challenge parallels:

Allegory	Business challenge
A war to win	Keep the company’s mojo working in the battlefield of logistics
Strong opponents (the English are outnumbered by the French)	Strong competition
Resources shortage	Labour shortage, increase of workload per person
Depressed/ despairing soldiers	Loss of focus and meaning, burn-outs> how to stimulate their self-reliance?

We then defined the favourable aspects of Henry’s strategy and defined parallel questions for the business challenge:

Table 2: Case 1, allegory and parallel questions:

Allegory	Business challenge
Outsmart the French (the nimble English archers win from the heavily armoured French, who sink in the mud)	Can the company think of a different approach to outsmart their competitors?
Henry disguises himself to meet his soldiers at night, to find out what bothers them	How do directors/ managers pay heed to their team members and their issues?
Henry considers the heavy responsibilities of kingship	How do directors/ managers deal with their responsibilities?
Crispin speech: Henry heartens his soldiers to rely on their own strength, persevere, take pride in their bond	How can the leader (director) motivate his/her colleagues?

Interpretative scheme

Our next step was to position the characters of Shakespeare’s *Henry V* in the four quadrants of the schematic crossed circle, which represents traits (cf. idealist vs. materialist, business vs. pastime, rational vs. intuitive, individualist vs. collectivist) and inclinations (centrifugal or centripetal, based on text analysis, see also par. 3.2.2; Casteren van Cattenburch, 2015, 2017; and Casteren van Cattenburch & Duijn, 2019):

Figure 4: Schematic ordering of characters in allegorical wholeness pattern:

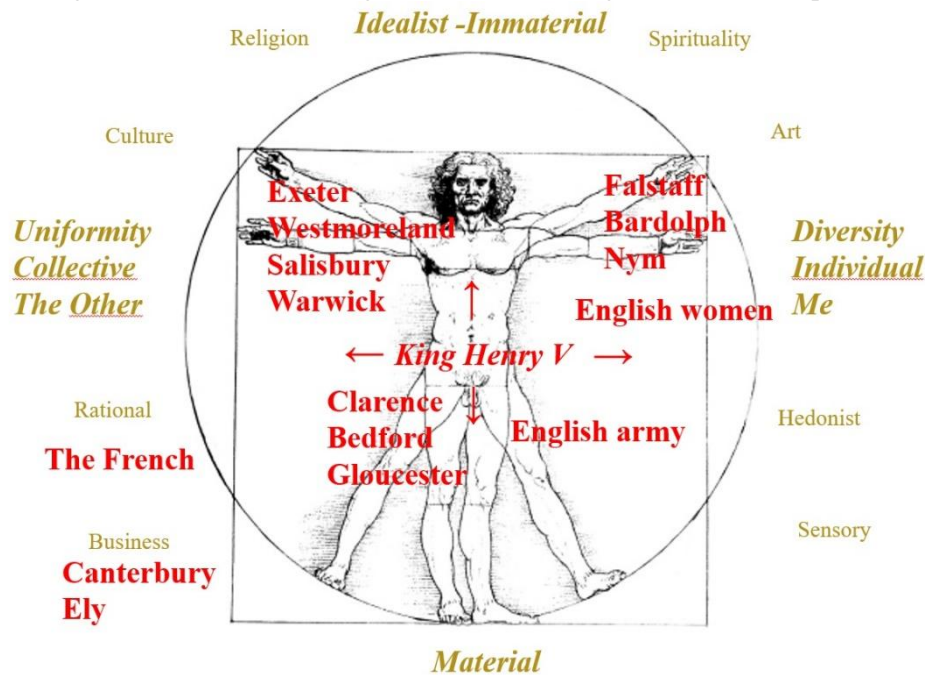


Figure 4 Schematic ordering of characters in allegorical wholeness pattern

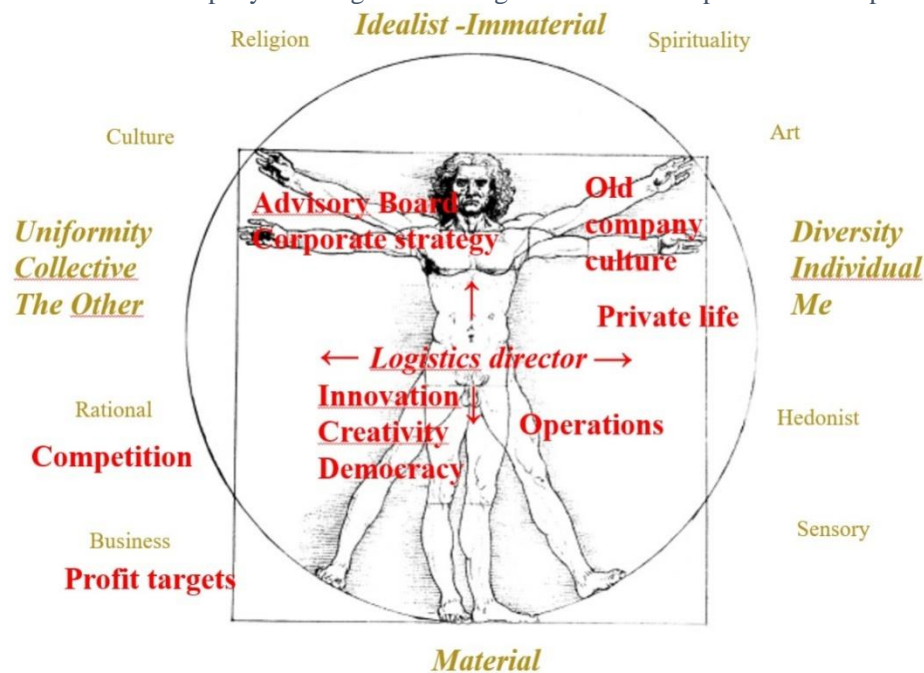
With their mastery of cunning tricks and eagerness to secure their financial position, the archbishops of Canterbury and Ely, for instance, represent a (derailed) business-oriented trait, which places them outside the periphery of the left lower quadrant, as opposed to the King’s old friends: the parochial, entertaining, ‘let-the-good-times-roll’ Falstaff, Bardolph and Nym (right upper quadrant). We divided the noblemen into two groups: Exeter, Westmoreland, Salisbury, and Warwick as the trusted advisors of the King and leaders of the military, with a visionary focus for the group but anxious attitude, in the upper left quadrant; Clarence, Bedford and Gloucester (the King’s brothers) as fearless fighters for the English cause, with an earthlier focus, in the lower left quadrant. We positioned the French army, with their arrogant invincible attitude, outside the circle in the lower left quadrant; the weary, patriotic English soldiers in the lower right quadrant.

We saw King Henry as the central point, who tries to find balance between his kingly duties and spiritual needs, his responsibility for the collective and his personal ambitions. As the play progresses, he moves around the four quadrants of the allegorical pattern.

Allocation of characters and plot to actors in company challenge

Now, structured allocation of the characters and plot to the actors in the company's case should give insight in the force field of the challenge, which we aimed to address in the workshop. We therefore matched the characters with corresponding actors in the company's challenge. Seeing the European Logistic Director as the representative of the company's C-suite, we made Henry V her counterpart in the allegory. Henry's older military leaders represented the advisory board and corporate strategy, whereas Henry's younger brothers represented the company's innovative, creative, and democratic powers. The tension between the French and the British army was analogous with the competitive atmosphere ('Competition') and the problems of labour shortage ('Operations') the company was facing. Likewise, we allocated the two shrewd clergymen to 'Profit targets', the King's old friends to 'Company culture' and the English women waving their husbands goodbye in Dover to 'Private life' of all employees of the company.

Figure 5 Allocation of actors to company challenge in the allegorical wholeness pattern as interpretative scheme:



Compilation of scenes

The idea of playing scenes of the allegory with the participants in the workshop began with the Logistics director's wish to discuss the relevant issues in a 'surprising' setting, so the management team members broaden their perspective in an open conversation. Of all participatory processes, conversation is a crucial and challenging part: How open are we, or can we be? Why? How can we foster and protect democracy? Allegorical reflection creates a safe(r) environment to enter conversations that 'develop equality, opening up to each other in an entirely natural way' (Stevenson, 2002, 422). Thus, allegory becomes a 'boundary object': a metaphor through which persons involved can convey, share, and combine their knowledge (Casteren van Cattenburch & Duijn, 2019, 110, referring to Bechky, 2003, and Hawkins et al., 2017). With these ideas and our interpretative scheme in mind, we chose 8 crucial scenes of Shakespeare's original play, in close consultation with the (theatre) director, and used a modern English translation to write the script.

4.2.3 The mirroring exercise: stepping into the allegory

We built on Richard Olivier's 'Mythodrama' (2008, 140) which employs the power of storytelling to demonstrate the skills and behaviours of leaders and enable them to adapt to new situations. Our purpose for the workshop was to offer the allegory as a safe learning space for the participants, where they could reflect on their situations and explore new ideas.

Instead of presenting the various issues they were dealing with in their organization, we wanted them to ‘step into the allegory’ and experience a mirrored situation that could raise learnings and values fundamental to the culture of the company and provide new ideas for the company’s future. To attain this, we did not hand out our script before the start of the workshop, so the participants played *prima vista*.

The evening before our workshop, we gave a brief and playful introduction to the employment and understanding of allegory, and the narrative of *Henry V*. In closing, we asked all participants one question for the night: What is your biggest challenge 1) as a professional; 2) as a team member? We did not plan to discuss their answers but wanted them to do this little mind exercise to mentally prepare themselves for the workshop.

The next morning, upon entrance, the participants received a copy of the script and took seats in the conference room. We worked with an improvised stage, theatre-style seating, and some props (a crown and robe for the King, bow and arrow for the soldiers). Invited by the director, the participants volunteered for playing at the beginning of each scene. Thus, cast and audience rotated during the workshop. Only King Henry was performed by the European logistics director of the company.

We chose each scene to express a perspective on the business challenge of the organization. The first scene began with a discussion of Henry and his advisors on the necessity of going to war, and the costs involved. Henry describes the objectives of his ambitious policy toward France: 1) to prove his abilities as an effective ruler in a successful campaign of conquest for the benefit of England, and 2) to sustain his authority as a legitimate king, seen as blessed by God in the eyes of his subjects. The allegorical King Henry here alludes to a leader in the company, who is entrusted with the responsibility for a thriving business and productive teams – for which (s)he will have to make choices regarding managerial, financial, and marketing strategies. The next scenes lead up to the battle at Agincourt:

- 1) Harbour scene: the army leaves for France, sent off by their families.
- 2) Having landed in France, preparing the decisive battle at Agincourt; Discussion of Henry’s soldiers, showing their exhaustion and despondency.
- 3) Henry’s insight and acceptance of the heavy duties of a King.
- 4) The exchange between the despondent soldiers and the (disguised) King.
- 5) The motivational speech of King Henry to his men.
- 6) The bewildering battle.
- 7) Reflections on the battle, victory celebration.

We played the eight scenes in a row, without intermediate reflections. Only the director interrupted for stage directions. She repeatedly invited the participants to use their imagination and carefully take note of the atmosphere of the scenes, the significance of the text, their role in the play, and their relationship towards the king and other characters. We observed a silent and attentive audience, as they were watching the poignant monologue of the king about the balance between professional responsibilities and personal needs (sc. 4). The next scene – in which the king disguised herself to have a chat with her soldiers – was received with amusement and laughter.

4.2.4 Reflexive conversation

In the discussion following the experimental role-playing, we took over the lead from the director, and asked the participants for their first thoughts on the match between the allegory and the path they were designing for the company’s future, considering their strategic challenges of labour shortage, hardening competition, and the protection of company culture. We were curious to see if and how Shakespeare’s wholeness pattern challenged the participants’ mental models and basic assumptions.

The team members understood the relevance of the allegory to the organization. They recognized ‘balance’ as a common theme:

- 1) balance between work and private.
- 2) balance between setting the company’s goals and their winning strategy.
- 3) the relationship between a leader and his people – how to make and keep them part of the company’s ‘family’?
- 4) They articulated parallels like the perilous position of the English on the French battlefield and the distressful situation of the understaffed teams in the competitive ‘battlefield of logistics’. They also noted how these parallels can generate ideas for improvement:

Table 3: Learnings case study:

Learnings	Parallels between the play and the company's challenges
L.#1: Listen to your team	<p>Participant #1: "It was interesting to recognize our own professional story in the play. How do you stimulate the involvement of your team? What type of leadership fits our company? Our team members don't want someone who is telling them to do this or that, they want a coach. Like the complaining soldiers tell the disguised King Henry. Is it true that Henry changes his approach? Does he really put himself in their shoes?"</p> <p>Participant #2: "This role-playing is a great match with the workshop we had earlier this morning, on what we expect from leadership. What are the key elements of successful leadership? One of them is: listen to your team. The team has ideas on how to improve logistics operations. We should do what King Henry does, when he disguises himself and talks to his soldiers, to find out their needs, and to think of a different approach."</p>
L.#2: When you ask people to work long hours, don't forget to think about their families	Participant #3: "If we are the King, as a company, we take our men into the next 'battle of logistics'. The King is enthusiastic and tries to motivate his team to join him. Most of the play is about the King and his men, but in the harbour scene, we zoom back to the ones who stay behind. The families see their men leaving and must support the King's nice new project. I think that this scene warns us to bear in mind that when we ask our team to work hard and make long days, there's always a family home, waiting, who might not be so happy with the nice new project."

It was interesting to see that emotional experiences and reactions to the play were combined with an intellectual curiosity to find a way to improve the organization. The managers noted that planning workload is not only about getting the job done, but about reducing team stress, burn-out and errors. They noted the irony in Henry's rhetorical Crispin speech in which he brilliantly inflames his men to 'get the job done' yet overrides their sorrows, picturing the leader as the 'perfect hypocrite' (Gould, 1919, 44). The logistics director (L.1) wondered if Henry only talks to his men to improve his own strategy, or if he really puts himself in the shoes of his men and treats them as equals.

After the first reaction round, we briefly introduced Shakespeare's wholeness pattern and the allocation of characters to the actors in the company's challenge (see figure §4.2.2). One participant remarked that it shed light on the force field in their strategic challenge, e.g. the analogy between the English and French armies and the company and their competitors. We talked about the different military strategies (the heavily armoured, unwieldy French army vs. the swift English longbowmen): "I see the heavy armour of the French as a metaphor for bureaucracy. Many companies have very time-consuming bureaucratic procedures. This is something that we should pride ourselves on in our company: That we aren't bureaucratic or hierarchical, and we trust our people. We are as agile as the English archers in *Henry V*." This point functioned as input for future training programmes for new employees.

In our concluding talk, the director of the company said that the application of Shakespeare's *Henry V* had "illustrated the goals we set together in a different way." Thinking of (new) links between the allegory and their reality had inspired the team members to identify causal connections, like the parallel between a) the women waving at the ships leaving the English harbour, and b) the families of the busy employees of the company, who 'might not be so happy with the nice new project' (L.#2). She confirmed that our explanation of the allegorical wholeness pattern clarified the working of the allegory in the force field of the company's challenge, because it provided them with an idea of the motives and drives of other actors within the force field. She added that such insights helped her management team to "pave the way into the future," but that they should spend more time on the allocation exercise to enrich their understanding of other perspectives and alternative futures.

5. Discussion

As indicated earlier we support the claim that narrative-driven concepts can enhance organizational learning and stimulate companies to develop futures literacy, by questioning and inventing anticipatory assumptions that inform their choices (e.g. Cagnin, 2018; Floyd 2008; Miller et al. 2015). Zooming in on the literary device of allegory, we claim that participation in an active reflection of Shakespeare's allegories inspires board members and teams to look at such strategic choices from a different angle and in the safe environment of the allegory as 'boundary object' (Hawkins et al. 2017), which enables them to discover and integrate views, perceive risks, come to a fuller understanding of their challenge, and anticipate decisions with a positive lasting impact. We now discuss to what extent we can substantiate these claims based on the case study, analyzed in Chapter 4.

In the table below we listed the aspects of organizational learning mentioned in paragraph 2.1 (based on Edmondson & Moingeon, 1996). We analyzed whether these aspects represent the learnings that we found in the case study.

Table 4: characteristics of organizational learning identified:

Characteristics Organizational Learning	Case
Encoding and modifying routines	Not found
Acquiring knowledge useful for the organization	L.#3: Input future training program for new employees (agile company culture & values)
Increasing organizational capacity for productive action	L.#1; Stimulate involvement of your team (instead of top-down decision-making)
Interpretation and sensemaking of the environment	L.#2; Look at the social environment of your employees
Developing knowledge about action-outcome relations	Not found
Detection and correction of errors	L.#1: The team has ideas on how to <i>improve</i> logistic operations.
Learning from each other by means of communication	L.#1: Listen to the team, they have ideas on how to improve logistic operations.

Table 4 indicates that the use of Shakespeare's allegory stimulates organizational learning in different ways. We found 5 of 7 characteristics.

We also analyzed the impacts of the use of the allegories on stimulating thoughts and actions for strategic foresight.

Table 5: Indications for the allegories' impact on stimulating strategic foresight.

Indications for Strategic Foresight	Value of the allegory
Continuous improvement	Limited but favourable; the allegory stimulated reflection and invited the participants to compare the current with the desired situation (cf. Biggs, 1999), but our case was not part of a continuous process.
Design-oriented, participative approach	Limited; the allegory invited all participants to share their perspectives, and thus uncovered new perspectives for the board to include in their new strategy, but due to time limits, we did not develop scenarios with in-/external stakeholders.
Opportunity for stakeholders to take part	Yes, at least when it comes to the organization's internal stakeholders, the participants recognized the indication of the allegory to make decision-making and implementation a shared effort with team members.
Restructure problems, new problem descriptions	Limited; the allegory articulated problems and indicated possible solutions, but again due to time limits, we did not actively re-define them.
Use creativity and imagination	Yes, the allegory was well recognized and accepted as an instrument to reflect on and explore the company's actions.
Capability to think outside the box and into the future	Yes, the allegory invited the participants to let go of their daily 'hassle' and creatively reflect on their challenges. New ideas for e.g., their training program and work/life balance strategy were noted down. The directors confirmed the value of the workshop regarding their company strategy, but we have no evidence that they used it for forecasting a more desired situation.
More sensitivity towards changes in the environment	Yes, the allegory stimulated more sensitivity towards respectively the social environment of the workers and the customers' experiences.
Unique creative dialogues to generate new ideas	Yes, the allegory gave the organizational members an instrument – a metaphor – to talk about their challenges in a safe and shared way (each of them knows about the same about the allegory used). It also generated new ideas.

Table 5 shows that Shakespeare's allegory stimulated ideas for strategic foresight, although we do not have direct proof of concrete actions. In our evaluation, the company director added that:

- 1) In the rapidly changing times of the 21st century, they needed to devote more time to strategy.
- 2) Shakespeare's allegory challenged them to 'think out-of-the-box', use their imagination and perceive their strategic challenges from a more holistic point of view.
- 3) The allocation of characters in Shakespeare's wholeness pattern to actors in their challenge provided insight into their force field, but we should dedicate more time to work this out with the group in future projects.

- 4) The allegorical reflection supported them to initiate new strategies, like 1) involving team members in the development of new strategy or 2) include values that discern their company from others (e.g. agility vs. bureaucracy) in their training programs.

We also saw that the application of the allegory in the workshop is an ‘act of connection’ within the team. Joint participation in telling, listening, and undergoing the story led to more empathy regarding their business issues, e.g., attention for work/life balance, compassionate leadership, company values, and mutual understanding.

6. Conclusion

When we embarked on this research project, we had envisioned our participants to ‘undergo a little bit of a learning experience’ (Roth & Kleiner, 1995, 3) from reflecting their own situation to the corresponding allegory and playing the allocation game. In four workshops with companies in the logistics industry, finance, and IT (one of which we worked out in detail in this article), we monitored if the application of allegory had any positive impact on their inquisitiveness as a learning organization, and tested our hypothesis:

- 1) That the application of allegory, based on Shakespeare’s wholeness pattern as mental model (Casteren van Cattenburch & Duijn, 2019), adds to their organization’s learning process.
- 2) That this might work as a decision-making tool to ‘learn and adapt’ (Weissenberger-Eibl et al., 2019, 1) and procreate a more sustainable approach.

The recorded follow-up talks provided us with direct responses to substantiate our analysis. The participants did not only recognize the pattern of the allegory, but also the reflection of their own strategic learning issues in the allegorical pattern. The experimental role-playing, their participation in the allegory and the use of metaphors created a safe space for them to think out-of-the-box and share subjective thoughts and intuitive associations. This newly gained space enabled them to question and dispute the behaviour and decisions of the characters and analogously think critically about their business strategy and staff policy.

The next step was to use these parallels for generating ideas for improvement. Shakespeare’s allegorical wholeness pattern as a basis under the allocation exercise helped the participants gain more insight in the force field of their challenge: who/ what are the driving and restraining forces around a desired change or action? How can we make productive use of driving forces, or how can we by-pass restraining forces? Deeper analysis of the allocated pattern has potential for future projects because it can clarify how anticipatory assumptions influence our understanding of the present (cf. Inayatullah 2004; Miller et al. 2018). In one of our other workshops, we saw the participants use the archetypal pattern of *King Lear* as a metaphorical ‘relief map’ to get a grip on the force field of external and internal dynamics in a period of transition. As the allegory represented their whole force field, this holistic perspective enabled them to ‘walk through’ an imagined future (or past) and see how forces are at work; and how they – as leaders – might positively influence these forces. The allocation exercise takes participants back to their initial decision-making context, while inviting them to test new questions and identify choices. Thus, it potentially creates a ‘transformative space for the creation of alternative futures’ (Inayatullah, 1998,815).

Other reflections on *Henry V* in the logistics case led to valuable discussions on generally accepted standards or old practices that might need a closer look or adjustment in the organization itself. Looking back at the scene where Henry disguises himself to meet and talk to his soldiers, the directors of the company said that planning workload ‘should not only be about getting the job done’ and that leaders should ‘take the time to listen to their team members’. As in Olivier’s Mythodrama, the application of Shakespeare’s allegory was ‘an experiential way of preparing leaders for the unforeseen events that will ultimately define their leadership’ (Olivier & Verity, 2008,140).

The learnings, commitment of the participants and recognition of the director of the logistic company prove the applicability of Shakespeare’s allegory as a powerful learning intervention that may enable leaders ‘to bring all of themselves to work, to stand up for what is important and adapt appropriately to meet new situations’ (Olivier & Verity, 2008, 143). This supports our first hypothesis that allegory can be a valuable tool for learning and strategic foresight. The director also endorsed our second hypothesis, that allegory can ‘work as a decision-making tool to learn and adapt and procreate a more sustainable approach’, although we would need more test cases and follow-up talks to add evidence and enrich our research.

Our third conclusion is that the allocation exercise along the lines of Shakespeare’s wholeness pattern potentially adds to the strategy toolbox of corporate professionals.

The process of thinking together about analogies (between characters and actors/forces, plot, and professional situation) maps out the force field of an organizational challenge, with specific attention to the dynamic relations between the actors involved and without any fixed target but open to multiple outcomes. As the allegorical pattern indicates trends, the allegorical mirror provides insight into the roles in the force field, makes aware of opportunities and threats during the process, prompting multi-perspective reflection and insight in what guides and frames anticipations.

Allegory, like narrative, is a ‘robust, valid basis for learning’ (Gearty et al., 2015) and can be applied as an anticipatory management tool. Its employment benefits organizations and may enhance futures literacy if leaders and team members are willing to look in the allegorical mirror and learn. As the logistic director in our first workshop said: “The application of Shakespeare’s allegory enables us to zoom out for the bigger picture and anticipate more sustainable strategies.”

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