

Using the Jazz Metaphor to Teach the Strategy Capstone Course

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ABSTRACT: The article discusses how the metaphor of jazz music making is used to facilitate visualisation and application of more “holistic” approaches, professionalism, strategic thinking, integration, and creativity in the strategic management capstone course. The evidence shows that students adapt well to and enjoy the jazz metaphor, and find that it facilitates their learning of the subject.

Keywords: jazz, improvisation, strategic capstone, management education

The capstone Strategy course represents a number of pedagogical challenges and opportunities. As noted in Kachra & Schnietz (2008, p.476-477), in most business schools, strategy is the capstone MBA course, scheduled last or at the end of the program explicitly for the purpose of developing integrated strategic decision-making skills in students. The idea behind the traditional approach to MBA integration has been to bring course work from the separate business disciplines together in a final strategic management class (Stephen, Parente, & Brown, 2002). That is, the capstone strategy class is intended to show students “how everything fits together” and “how to think and make decisions like a senior manager” (Rapert, Smith, Velliquette & Garrotson, 2004).

Kachra & Schietz (2008, p. 477) note however that while “the sophistication of integration required by contemporary managers is escalating (Crittenden, 2005; Steiner & Wells, 2000; True, Pelton, Seldon & Alsup, 2000) the format of most strategy courses has remained largely unchanged for decades.” Kachra & Schietz (2008, p. 477) go on to note that “a review of the strategy education literature suggests that the structure of the traditional MBA strategy capstone course has remained relatively unchanged over the past 20 years (Crittenden, 2005; Knights & Willmott, 1997; Liedtka & Rosenblum, 1998), and similarly strategy pedagogies are relatively unchanged (Anderson, 2000; Minzberg & Gosling, 2002).”

The management profession, those of us in management education, and most specifically those of us that teach the strategy capstone course, are thus faced with key questions of the mismatch between the structure of the typical strategy course and the needs, demands and skills required of managers in today's fast changing world. Increasingly, the depth and breadth of strategic change that companies must undertake to survive is significant (Hammer & Champy, 1993), and managers often find themselves in decision-making situations that transcend their functional areas of expertise and challenge their comfort zones.

As Smith (2006, p.5) points out today's fast changing world requires managers to “draw on multiple sources of (often) imperfect evidence; go beyond the ‘literal’ consumer survey evidence; make

various creative interventions to provide fresh insights and new perspective; and also weave customer knowledge together with other types of market, financial and organisational information.”

This challenge has enormous implications, not only for today’s managers, but for tomorrow’s. Today’s management students must be equipped to deal with the changing strategic requirements of today’s and tomorrow’s world. However, even visualizing the necessary process for change, must less being conversant with it, is often not easy. To this end, the use of metaphor as an educational tool may be very useful.

Metaphors in Business and Business Education

Metaphor allows us to interpret an organisation by focussing on an image (or symbol) that represents an aspect of that organisation and provides a unique perspective that is bound up in the essence of the image. As noted by Dennis & Macaulay (2007), many famous examples of management metaphors are offered by Morgan (1997) including the organisation as machine, as organism, or as political institution. Indeed Morgan (1997, p.4) suggests that metaphorical thinking permeates all types of business thought: “All theories of organization and management are based on implicit images or metaphors that lead us to see, understand and manage organizations in distinctive yet partial ways.”

Jazz has been identified as the dominant metaphor in theory development for organisational studies (Kamoche et al. 2003). Jazz has also been increasingly ubiquitous in a range of management literature dealing with strategic fit (Neilsen, 1992), organisational development (Lewin, 1998), new product development (Moorman & Miner, 1998; Kamoche & Cunha, 2001), leadership (Newton, 2004), organisational learning (Barrett,1998), and organisational networks, (Pavlovich, 2003).

In addition to its use in helping the transfer of knowledge in business, the use of metaphor, including musical metaphors, has been successfully used in the business classroom across a variety of disciplines as mechanism for building creativity and enlightening learning: in organisational theory (e.g. Oswick, Keenoy, & Grant, 2002; Taber, T.D., 2007); strategic management (Weick, 2003); general management (Moshavi, 2001); marketing management (Weinrauch, 2005). The jazz metaphor specifically has been applied to management education in the area of leadership (Lengnick-Hall & Lengnick-Hall, 1999), as well as economics (Tinari & Khandke, 2002), but has not been applied to the strategic capstone classroom. This paper advances the discussion in the literature using the metaphor of jazz music making/improvisation as applied to the teaching of the capstone strategy course.

The Jazz Metaphor, Improvisation and the Capstone Strategy Course

Based on a twenty year career in strategic planning and management (divided between industry and academia), as well as his professional jazz experience, the author believes the reason that jazz is a very useful metaphor for the teaching of strategic management, is the relevance of its application to the subject. Like with the jazz idiom, linearity and unbounded predictability are not currently appropriate in strategy given current fast changing conditions. Rather, what *are* required are more creativity, flexibility, new methods of application, and the like.

As noted by Nachmanovitch (1990, p.17), “We are all improvisers. Every conversation is a form of jazz. The activity of instantaneous improvisation is as ordinary to us as breathing. Whether we are

creating high art or a meal, we improvise when we move with the flow of time and with our own evolving consciousness, rather than with a prescribed script or recipe.”

Is improvisation, and particularly the metaphor of jazz music making antithetical to the teaching of the strategic capstone? Not at all! The point of this article is that the metaphor can be useful in facilitating student learning in the required directions.

While there are many types of jazz, causing the great jazz trumpeter and composer Miles Davis to note, “Jazz is a big word,” (Carr, 1998), the metaphor is not compromised, but rather improved, by this diversity. All forms of jazz require a degree of structure, improvisation around that structure, cooperation, and common goals of performance.

More specifically, the author contends that within the improvisational jazz medium successful performance requires full knowledge of (1) the context, (2) techniques, options, and creative application of those techniques, (3) virtuosity and artistry, (4) creative listening to work with others in the group, (5) leadership (in whole or part), (6) confidence, and (7) on collaboration. By applying these within the strategic capstone classroom, and utilising the many similarities between the objectives and process of strategy development and implementation and the elements required for successful jazz music making, we can suggest a “success” framework that can provide additional insight and application of strategic techniques and issues to the classroom, as well as one that can hopefully provide additional insight for moving the management profession forward in improving organisational decision-making. We can also add an element of fun and creativity to what is often a challenging course for students.

In the discussion below I briefly (given length restrictions) suggest how we can utilise the jazz metaphor to facilitate learning of the key topical areas and issues which typically form the core of the capstone strategy course, including environmental assessment and determination of the strategic position, strategic analysis, elements of the strategic process, and evaluation of strategy and strategists.

Context and Situation Analysis: Environmental Assessment and the Strategic Position

In introducing the jazz metaphor and the framework for successful performance to my strategy capstone students we discuss how jazz musicians must understand a number of aspects of the context to successfully perform their role. These elements include knowing the song structure and style, the abilities and roles of other players, as well as audience and venue characteristics. We then discuss the quite similar idea that strategists must understand contextual aspects to be successful improvisers/implementers. This sets the stage for a discussion of strategic environmental assessment, determination of the strategic position, and the relationship to improvisational degrees of freedom. Students are told that an important contextual determination for them to be aware of is the degree to which the organisation itself is improvisational, and how this relates to its level of market orientation. For example, Dennis and Macaulay (2007) posit at least four levels:

- One size fits all organisations embody a low market orientation with low levels of improvisation; rigid, overly bureaucratic organisations they reject creative solutions and prefer strict planning.

- Improvisation through pre-planned alternatives can be found in organisations with low market orientation, limited strategic planning, but higher levels of principally operational improvisation.
- Single level improvisers are characterised by high market orientation with low levels of mainly tactical improvisation.
- Multi-level improvisers are organisations with both high market orientation and high levels of improvisation. Improvisation at all levels of the organisation is encouraged by this type of organisation.

While this framework is somewhat simplistic, I tell my students that knowing the degree of improvisation and its characteristic levels within the organisation is an important guideline for strategists who must (like jazz musicians) “work” the context.

Strategic Analysis, Use of Techniques, and Creative Application Options

The strategy capstone course, of course, introduces and integrates a number of tools and processes (e.g portfolio analysis, Five Forces, Ansoff matrix and so on) for strategic analysis. I tell my students that, similarly, Jazz players *must* have many tools and approaches to play and improvise at will, lest their music making and contribution to the group be limited. They must have a full range of techniques to call upon, and be able to use these in a range of keys, tempos, and styles.

I discuss with my students that strategists and Jazz players must further exhibit flexibility and judgment in their ability to apply these various techniques appropriately to the situation—an oxymoron is a jazz musician who plays the same way regardless of situation. I use the jazz metaphor to further delve into the important notions of virtuosity, and artistry.

Virtuosity and Artistry

Jazz musicians who are more than capable display both virtuosity and artistry. Virtuosity implies technique to burn, while artistry is the constant search for betterment in the art.

While there are again many examples of virtuosity and artistry within the jazz milieu, an example I often use in the course is that of perhaps the greatest jazz pianist of his age--Keith Jarrett--who typifies both. A jazz “wunderkind”—who also is a composer of note, expertly plays several instruments, and has recorded a number of demanding classical music pieces with orchestra, Jarrett has technique to burn. However, it is his improvisational skills and artistry that have made for a sustained career. His artistry is seen prototypically in the following example that I present to my market research students. After decades of constant touring, Jarrett was diagnosed with Chronic Fatigue Syndrome, and took a hiatus from the concert stage, using this time to totally re-examine the way in which he made music—spending thousands of hours re-examining, relearning and re-educating his hands, heart and mind to go beyond the familiar and usual ways—at a time when his artistry was unquestioned.

Throughout the capstone course, I continually emphasise that in applying the jazz metaphor to the strategic arena, the requirements for more integration and creativity suggest a heightened degree of artistry and virtuosity. I suggest to my students that we must increasingly go beyond the usual and familiar –constantly seeking a better way.

Strategic Process: Creative Listening, Leadership, Confidence, Collaboration, and Mastery

I tell my strategy capstone students that processes of strategy development and implementation are likely to differ over time and in different contexts, yet the importance of creative listening, leadership, confidence, collaboration and mastery remain critical throughout. Each of these elements is suggested by the jazz metaphor and the “success framework, and are briefly discussed below.

Creative Listening to Work with Others in the Group

Listening plays a huge part in an improvised Jazz performance, as the players respond, contribute and anticipate directions in the musical flow. The notion of creative listening is a key concept (suggested by the jazz metaphor) to consider in terms of the strategic process. I typically introduce this notion to my strategy students through a number of role-play exercises that are used to illustrate the application of this technique to the strategic process.

Leadership and Confidence

Leadership for strategists is a key element to meet the requirements of a new, holistic approach. I tell my students that in a jazz group, all players have potential for leadership as (at least occasional) soloists. Further, many rhythm section players, whose stereotypical role is one of support, are leaders of groups in their own right due to their virtuosity and creativity.

Confidence is a key element of leadership, and is something that is endemic to being a good jazz soloist. I tell my students that confidence comes through practice and application—through the doing, music making, and the “letting go” in a jazz group. We discuss, as related by Holbrook (2009), to be an effective jazz improviser musically takes countless hours of practice of scales, keys, application of chord voicing’s, and on and on. The key point is that improvisation (whether musical or strategic) is not just “winging it”, but requires practice and more practice.

Collaboration

Collaboration and integration are key concepts for strategists that have parallels in the successful jazz performance. The “tight” sound characteristic of a jazz group that has played together successfully for a long time displays a “fusion” --which amply displays the notion that the whole is much greater than the sum of the parts. The players think, feel, act, and play as one. They not only react quickly to what others are doing, but can essentially anticipate directional changes. Each player through his or her own efforts and ideas both feeds and leads the group directionally at different moments towards the combined goal.

Towards “Effortless Mastery”

Watching a master craftsman one is immediately struck by the seemingly effortless nature with which the master performs his or her task. I use the following illustration to discuss, and hopefully instil the notion of effortless mastery in my strategy students.

In his book *Effortless Mastery: Liberating the Master Musician Within*, Kenny Werner (1996) advocates that mastery as a musician can be learned through a creative letting go—liberating the master musician within. This does not mean that the aspiring player abandons the practice regime which will make him or her more conversant with the required technical aspects of his art. Indeed, a mastery of technique is a prerequisite for being a capable player (as well as a capable researcher). The aim is to go far beyond the capable. A master jazz musician is a player who is technically superb, with a range of technical applications and the knowledge to *creatively* apply them, who is capable of rapid affective response, who pushes the limits of expression and application, plays his own song (e.g. Green 2003; Green & Gallwey 1986; Lieberman, 1997) but is nevertheless true to the form (structure) and context. The point is that much of what we need to know is within us. Strategists, like jazz musicians, must learn to tap this knowledge and to trust our instincts (e.g. Bell, Burson, Gregory, & Watts, 2007).

Part of moving toward Effortless Mastery (Werner, 1996) involves reflection and evaluation. An extrapolation from Smith’s (2006) assigned reading for my students suggests that the new more holistic strategy requirements mean that we as a profession must work toward new mechanisms, (and author’s comment---perhaps new metrics) of evaluating strategy quality, as below.

Evaluation of Strategy and Strategists

What might the jazz metaphor suggest in terms of strategy (and strategists) evaluation/mastery?

Evaluation of a jazz performance is a function of the various elements we have previously discussed,

i.e. the coming together of context, techniques and their application, artistry and virtuosity, collaboration and fusion of the group, and so on in the quest of the performance objectives.

As part of our discussion in this area, my students and I discuss how strategic analysis, like a jazz performance, can be evaluated in terms of the contextual elements within which it operates. Just as a successful jazz performance must “work” in terms of the various contextual elements of the song “form”, venue, audience characteristics, abilities and roles of the players, and so on, we discuss how the application of the jazz metaphor to strategy suggests several contextual evaluation criteria:

- Is it true to the “form” (strategic problem)?
- How well does the proposed strategy facilitate decisions within the context?
- Does it provide direction?
- Is it timely?
- How well is it accepted by decision-makers and other audiences, and how appropriately applied within the context?
- To what degree does the proposed strategy match up to strategic criteria?
- Does it suggest strategic investment, contribute to functional area strategies?
- To what extent does it offer potential for substantial competitive advantage; provide evidence of market needs and potential key success factors?

Application of the jazz metaphor also suggests performance evaluation criteria that can be applied to each of us as individual strategists, as well--including our level of confidence, our ability to have a full range of analytical techniques, and to creatively apply these, are we constantly looking for better answers, and new ways of designing and conducting impactful analyses that aid decision-making? Do we at least occasionally exercise a leadership role in the context of business decisions? Are we forthcoming and forthright about the limitations and appropriate applications of the selected strategic techniques? How well have we collaborated with key decision-makers?

Conclusion

This article has discussed how the metaphor of jazz music making is used to facilitate visualisation and application of more “holistic” approaches, professionalism, strategic thinking and creativity in the strategy capstone course. More specifically it has put forth the notion that for strategists (like jazz musicians), successful performance requires (1) full knowledge of the context, (2) mastery of a number of techniques, options, and appropriate creative application of those techniques, (3) virtuosity and artistry, (4) creative listening to work with others in the group, (5) leadership (in whole or part), (6) confidence, and (7) collaboration. The article has suggested (subject to length restrictions) some classroom illustrations of how the jazz metaphor and the above notions of a successful jazz performance are used by the author to facilitate student learning of some of the key strategic topics encountered in the strategy capstone course, including situation analysis, environmental assessment, determination of the strategic position, strategic analysis, use of strategic techniques, the strategic process, and the like.

This article has also put forth the notion that strategy students, like jazz musicians, can work towards an “effortless mastery” of their craft. This requires both continuing, purposeful practice in all manner of techniques and theories, but also self- reflection, evaluation, and a growing confidence to trust in our own abilities, and the appropriateness of our judgments as regards the needs of decision-making.

The article has additionally contributed to the literature in suggesting potential new forms of evaluation criteria which can be used in evaluating the quality of a course of strategic action.

Importantly, like jazz musicians, strategy students (and instructors) can all *learn* to be better strategic thinkers, improvisers, and leaders, and as with many things, the learning is often in the doing. The jazz metaphor provides training directions and examples that can aid us in the quest for effective mechanisms for facilitating student learning in the capstone strategy course. Operationally, the author's experience is that this is a very easy metaphor for students to translate and understand, and that they indicate it really does facilitate their learning.

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