



# Exploring the relationship between scenario planning and perceptions of learning organization characteristics

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## Abstract

This article attempts to verify some assumptions evident in the scenario planning literature through the application of quantitative measures. The Dimensions of the Learning Organization Questionnaire is used to measure participant perceptions of the learning organization characteristics pre- and post-scenario planning intervention. Results are discussed, limitations are identified and clarified, and conclusions are drawn with speculations and refinements for future research.

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## 1. Introduction

Scenario planning has been reported as a method of creating, enhancing, and improving the learning organization [1–3]. While these claims have been abundant in the scenario planning literature, there has been no quantitative support for these claims. Efforts to evaluate scenario planning through quantitative analyses do not exist [4] and for scholars interested in establishing and documenting the effects of scenario planning in an observable, consistent and careful manner, the current lack of sound scenario planning research provides a ripe agenda.

While there is not yet evidence of a correlation between scenario planning, and the construct of organizational learning (which is considered a necessary component of the learning organization), there does seem to be some evidence of individual learning in

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the scenario planning experience although none of it is documented in a rigorous or careful manner. Many authors have based their work in cognitive psychology, and specifically, in the concept of mental models [2,5–8]. This work is also generally descriptive and conceptual and often refers to the classic Royal Dutch/Shell examples and cases [3,9]. These cases and descriptive examples have fueled larger claims that are unfounded according to academic research methods; however, they do spark interest in investigating the phenomena more closely. To be clear, while individual and organizational learning *seem* to be and are reported as intricate components of successful scenario planning, their relationships must be examined more closely.

This article does not intend to be overly critical of scenario planning pioneers. On the contrary, let the work of these exceptionally creative and generative thinkers be acknowledged [2,3,5–12]. In addition, this article also argues that the time has emerged for more careful documentation of what contributes to the success of scenario planning and what contributes to its failure. Furthermore, this careful documentation might best be conducted through the use of academic tools that have been neglected thus far in the analysis of scenario planning projects.

**2. Theoretical framework**

Chermack [13] devised a method of evaluating performance-based scenario planning. The method consisted of evaluating scenario planning in terms of economic, systems, and psychological domains at the individual, group, and organizational levels. Chermack [13] developed an evaluation heuristic and also a research agenda for assessing performance-based scenario planning according to multiple measures and from multiple methodological approaches (see Fig. 1). This article reports on quantitative research that explores ONE aspect of that matrix—namely, psychological performance (learning) at the organizational level. To clarify, this article explores the effects of scenario planning on perceptions of learning at the organizational level.

In addition to this evaluative framework, Chermack [14] also developed a theory of scenario planning using Dubin’s [15] quantitative theory building methodology. In it, Chermack hypothesized “a positive relationship between participation in scenario planning and learning at multiple levels” [14, p. 70]. Thus this study serves in part to provide general evaluation of prevalent claims in the scenario literature that scenario planning enhances organizational learning, and in part to investigate the accuracy of one component of Chermack’s [14] theoretical model.

Level of Performance	Theoretical Foundation and Evaluation Measure		
	Economic Performance	Psychological Performance	System Performance
Job/Performer			
Group/Process			
Organization		<b>*The focus of this inquiry</b>	

Fig. 1. Heuristic for evaluating scenario planning in performance contexts (Based on Swanson [33] and Rummier and Brache [34] (Chermack [13])).

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