Toward an integrative approach to designing service experiences
Lessons learned from the theatre

F. Ian Stuart*, Stephen Tax

Faculty of Business, University of Victoria, P.O. Box 1700, Victoria, BC, Canada V8W 2Y2

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Abstract

A critical element in designing a new service and ultimately achieving customer delight and loyalty, particularly for competitive services where the customer–service provider interface is high, deals with the delivery of memorable personal experience. Since many such services rely on attributes of theatre-like performance, this research examines the process by which theatre plays are chosen, designed and developed with the objective of better understanding how performance excellence is realized. Theatre plays were chosen as a basis for study because of their long history of mastering the critical elements of performance staging and the reputation for opening on time at near peak performance levels. Using a case-based, qualitative research approach, the theatre play process is described, implications are extracted and a corresponding management process model is presented. Research and management implications for new service design and service delivery excellence are suggested.

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1. Introduction

Service design research and practice are in a state of transition. While the quality movement of the 1980s focused attention on reliability as the driving force behind customer satisfaction and long-term profitability, evidence that even satisfied customers frequently defect (Reicheld, 1996; Reicheld and Sasser, 1990) suggests that reliability alone does not provide the most compelling value proposition (Chase and Dasu, 2001). Increasingly, firms are coming to realize that high levels of customer satisfaction and service reliability are necessary but not sufficient conditions for high levels of customer loyalty. To use Kano’s terms (Evans and Lindsay, 2002, p.168), service reliability is increasingly a “satisfier” attribute rather than an exciter/delighter.

As a result, attention in the field is shifting away from the notion of simply designing consistent service encounters toward the staging of memorable personal experiences (Berry and Bendapudi, 2003; Pine and Gilmore, 1999; Gilmore and Pine, 2000; Gupta and Vajic, 2000). Fitzsimmons and Fitzsimmons (2004,
p. 10) suggest that services are “... in the process of witnessing a transformation from the traditional concept of a service transaction to one of an experience”. Chase and Dasu (2001) argue that service design needs to incorporate behavioral dimensions while Normann (1991) suggests that including symbolic and psychological aspects enhances value creation. This has sparked criticism of the dominant service design models which fail to incorporate the challenges of creating a compelling customer experiences (Edvardsson et al., 2000; Fitzsimmons and Fitzsimmons, 2000; Gupta and Vajic, 2000; Menor et al., 2002; Pine and Gilmore, 1999). While services may be shifting to a paradigm of delivering customer experiences, academic research on service design remains focused in the past.

Ironically, viewing services as experiences represents a movement back to first principles. Beginning in the early 1980s with the first English version of the SERVUCTION (service-production) model (Langeard et al., 1981), services have long been defined as live performances (Berry, 1980; Deighton, 1992; Lovelock, 1983; Schlesinger, 2003; Zeithaml and Bitner, 2000). Underlying this definition are the historic building blocks of services theory; services are intangible acts; the customer is present in the service process; production and consumption are inseparable, and services cannot be inventoried. More directly, as the SERVUCTION model indicates, services are fundamentally comprised of the interaction of people, processes and the physical environment (Lovelock, 1983; Tax and Stuart, 1997; Zeithaml and Bitner, 2000) and represent a fragile, interconnected system.

Numerous scholars have observed that the people (actors), processes (script) and physical environment (set) resemble a live theatrical performance (Grove et al., 2000a, 2000b; Harris et al., 2001; Schlesinger, 1991). This theatrical approach is consistent with the notion of “staging” a performance in delivering service experiences (Fitzsimmons and Fitzsimmons, 2000; Gupta and Vajic, 2000; Pine and Gilmore, 1999). More specifically, service experiences have been classified into four subcategories based on the extent of customer participation (passive or active) and the customer’s relationship with the surrounding delivery environment (absorption or immersion) (Pine and Gilmore, 1999; Fitzsimmons and Fitzsimmons, 2004).

Exceptional service firms enhance their customers’ experience (and hence loyalty) by designing their service system to encourage greater active customer participation and/or to make the environment more conducive to customer absorption. Examples of such movements to enhance the experience could include the English-as-a-second language instructor who incorporates field-based exercises (having to order food in a restaurant, asking for directions in a crowded subway), banks which provide their clients with online banking and investment management services to allow greater customer control and involvement, the tour operator who acts out a battle for the customers during a tour of the Plains of Abraham and airlines that permit their customers to self-select their seating and meals in advance and by themselves.

Research in the field of designing services for experience is lacking. Our objective is to advance the theory and practice of new service design, with an emphasis on developing a deeper understanding of the requirements for effectively designing and producing the performance elements that help to create a memorable experience. This addresses the call for research contributing to the development of frameworks enhancing the understanding of service experience design (e.g., Verma et al., 2002; Hill et al., 2002; Fitzsimmons and Fitzsimmons, 2000). To provide focus to our research, we concentrate our efforts on understanding how theatrical performances are developed and staged, theatre plays being a logical choice in grounding our work using a best practice environment. In doing so, we examine the distinguishing process features used by theatre companies in their attempts to engage the audience beyond passive/absorption. These actions, and the principal focus of our work here, can take the form of managing service processes to minimize the potential for disruptive influences that might prevent a theatre audience from becoming immersed in the play itself (e.g. awkward or inappropriate light and sound, disruptive scene changes, dead air, etc.). Alternative actions, which are not addressed in this study, could take a positive, proactive form such as choosing a script from a playwright like Brecht, who purposely crafted his plays to incorporate audience participation through the play’s content and structure or choosing a genre such as the British pantomime whose principal purpose is active patron involvement in a light-hearted
and humorous rendition of a traditional play (Harris et al., 2001).

The paper is developed in stages. In stage one, we review the service design literature, noting the contributions and limitations present in current models. Next, we examine the literature on the service experience, link it to the design of performances and demonstrate how studying the theatrical production process can provide valuable insights into service experience design issues and model development. In the third stage, we describe a multi-method case study of the process used to stage an actual theatrical production. This is followed by a description of that process and the identification of key principles of performance design. We conclude with a series of implications for managing the service design process and opportunities for future research.

2. The service design process

Service design has received limited attention in the service management literature, a cause for concern given its central importance to quality outcomes and efficient delivery (Brown et al., 1994; Froehle et al., 2000; Martin and Horne, 1993). Typical service design models are derivatives of Booz-Allen & Hamilton’s (1982) development process taken from studying client applications in a goods environment (Scheuing and Johnson, 1989; Bowers, 1987; Easingwood, 1986; Cooper et al., 1991, 1994; de Brentani and Cooper, 1992; de Brentani, 1989, 1993, 1995; Edgett, 1994). These models share the notion of a sequential multi-phase approach beginning with idea generation and moving through steps such as concept development, business analysis, prototype testing, market testing and commercialization. The assumptions associated with adopting the goods-based approach have been challenged by many scholars (Bitner, 1992; Edvardsson et al., 2000; Fitzsimmons and Fitzsimmons, 2000; Gronroos, 1993, 1994; Gumnessson, 1993). For the most part, the critiques centre on the lack of integration between the marketing, operations, human resources, physical environment and technology components of service design. The studies also fail to capture the specifics of actual design and planning challenges (Tax and Stuart, 1997) and fundamentally overlook the distinguishing features associated with services (Edvardsson et al., 2000; Hill et al., 2002). As Gumnessson (1993, p. 210) observes, “we must go into detail in designing services. Without it, the service concept and service development process in general lack substance”.

More recently, design and development research has examined specific elements and challenges of services, notably in the area of emerging technologies, customer self-service, the effective employment of teams and formalization and speed of executing new design processes (Froehle et al., 2000; Berry and Lampo, 2000; Meuter et al., 2000; Tatikonda and Zeithaml, 2001) and new models have been offered (Johnson et al., 2000; Edvardsson et al., 2000; Verma et al., 2001; Fitzsimmons and Fitzsimmons, 2000). Building on Tax and Stuart (1997), Fitzsimmons and Fitzsimmons (2000) present a new conceptual service development cycle that incorporates a planning and execution phase and considers some of the functional integration, business analysis, marketing program testing, and internal resources and capabilities required for effective development. Edvardsson et al. (2000) present a model of new service development aimed at contributing a better understanding of the mechanisms and patterns which explain the development of world-class services. The model is based on four phases: service idea and generation, the service strategy and culture gate (fit), service design and service policy deployment and implementation.

These recent conceptual models provide important perspectives into elements that broadly support the orderly design and launch of services. However, these models, while helpful in a broad sense, are still focused on the development of efficient and reliable service encounters, not memorable experiences and are therefore incomplete and inconsistent with more recent industry trends towards service experiences.

3. Designing performances and delivering experiences – a theatrical approach

While service theory has evolved over the past 30 years, one constant remains – services are performances (Berry, 1980; Deighton, 1992; Lovelock, 1983; Schlesinger, 1991; Zeithaml and Bitner, 2000). This core principle was lost on the early service design literature. However, Pine II and Gilmore’s (1999, p.
stages (Arnould et al., 1998; Bitner et al., 1994). Others (Grove et al., 2000a, 2000b; Zikmund, 1982) argue that theatre is an appropriate metaphor for services. They point to the parallels between service management and theatre, especially those services where customers are present in a physical environment controlled by the firm. Using the concepts of theatre allows for describing critical design elements in terms of producers (executives), directors (managers), actors (service providers), audience members (customers), the script (customer and service provider training, customer contact, service processes and customer involvement), stage decorations and props (physical facilities, servicescape and equipment), costume design (uniforms), rehearsals (pilot tests), and backstage production (hidden factory). From this view, the value of a service experience is largely a function of how well the provider integrates theatrical components to generate a great performance (Grove et al., 1992; Deighton, 1992; Gupta and Vajic, 2000; Gilmore and Pine, 2000). Such observations are consistent with the view of Pine and Gilmore (1999) who describe “work as theatre” reflecting the notion that great performances deliver memorable experiences.

Overall, there is growing evidence of a close link between memorable service experiences and performance but the theatre-based empirical research to date suffers from a fundamental flaw. Services are carefully integrated systems (Hill et al., 2002; Tax and Stuart, 1997; Heskett et al., 1990, 1997; Schneider and Bowen, 1995; Schlesinger, 1991) and it is the system that must be studied to fully understand how the service design and development process works. Despite notable advances in our understanding of this link, little is known about the management processes involved. A key implication of the principle that services are performances and that great performance lead to memorable service experiences is that to understand service design one must understand the process of designing performance (Stuart et al., 2002).

Theatre is a valuable place to study design of performances for a number of additional reasons. The processes used to develop new theatrical productions represent a “best practice” methodology for designing live performances. In particular, the theatre industry has created a system, revised and perfected over the past several hundreds of years (see Appendix A), that delivers a performance both efficiently (i.e. time from concept development to opening, a process for developing and adhering to a constrained budget) and effectively (i.e. opening night being at a high level of quality, limited post-opening improvements).
(Schechner, 1988; Wilson, 1991). Unlike the cinema which can benefit from post-production editing, a live production raises the stakes in terms of doing things right from the outset. Theatre plays, therefore, overcome the concern that expressed by some researchers that many new services operate in a mode of serendipity which incur frequent delays in opening and/or require a number of subsequent redesign iterations before operating effectively (Tax and Stuart, 1997). The theatre is also an excellent setting to learn about creativity and managing complexity (LBS speech), both typical requirements of new service design. Because each play can be characterized as a new offering, theatres engage in a high rate of innovation and are involved in continuous service development (Voss and Voss, 2000).

4. Methodology

Consistent with the current body of knowledge and the nature of the research question, an in-depth qualitative case study of an actual theatrical production was undertaken to provide a thorough understanding and rich description of how performances are designed and staged (Stuart et al., 2002; Handfield and Melnyk, 1998; Eisenhardt, 1989; Gubrium, 1988; Schein, 1986, 1987; Yin, 1984, 1993, 1994; Weber, 1947). This approach follows the observation of Stuart et al. (2002) that detailed studies of new service designs, including the problems experienced and the corrective actions attempted, are a particularly appropriate methodology to gain the rich insights necessary for theoretical development and to fully understand the process from a longitudinal perspective where the theory development is in its infancy. It is also consistent with other studies aimed at achieving a deeper understanding of services in general (e.g., Arnould et al., 1998) and service design in particular (Gummesson, 1993, 1994). Following the development of a theatrical production from beginning to end provided an opportunity to see it unfold, identify the many challenges involved in designing performances and understand the approaches used to manage the obstacles and complications.

The use of a single case study is consistent with the ethnographic approach (e.g., Arnould et al., 1998). Nonetheless, while theatre companies vary somewhat in execution, the theatrical production process is necessarily consistent across companies in terms of the set and timing of activities involved in staging a performance (Nelms, 1965; Schechner, 1988; Wilson, 1991). This was confirmed by the actors, director and technical design team members who had a combined work experience of over 1000 plays across scores of major companies in many countries. They noted that to be able to operate efficiently and effectively and bring together a team to create a production, theatre companies needed to adopt a standard design procedure. Subsequent field interviews by the authors in different countries and with different theatre company directors revealed that once you have studied one professional theatre company’s process, you have studied them all. Hence, even though we describe one theatre company’s process, generalizations to all theatre companies can be made without any serious misgivings. The usual criticism that case studies lack of generalizability is not a concern in this situation.

The theatre company, the Belfry, was selected for its excellent reputation in producing plays and for the general manager/producer and artistic directors’ allowing open access to all of the people and activities associated with the production. The company is financially viable and has been for more than a decade, is professionally managed, operates from physical facilities that are well maintained and visually appealing, and has a growing base of season subscribers and donors (both corporate and individual). The play, “The Cripple of Inishmaan”, was chosen because of its complexity (nine actors, five sets, difficult accents) reflecting a challenging environment for the director, actors and technical design team. While some planning activity, which will be described later, took place well in advance of the beginning of rehearsals, the vast majority of activity and the principal focus of our research occurred over a 1-month period prior to opening night.

The research comprised of in-depth interviews with all members of the production team (see Appendix B), attendance at all meetings (“meet the donuts”, production meetings, notes meetings, design/technical meetings, costume fittings, dialect coach) rehearsals (daily, technical and dress), light and sound level settings and cue-to-cue tests, viewing of performances (previews, opening night and others) and assessment
of artifacts (e.g., rehearsal reports, script, production archive, set drawings, costume drawings, various design plots) created during the process of the designing and staging the theatrical production. We also attended the opening night performance as well as an additional five performances during the play’s 4-week run. In addition, one member of our research team, an MBA graduate, had 10 years experience as stage manager for a major theatre production company. While we will elaborate on the research methods used as we describe the theatre design process, it is worth noting here that the interviews were conducted with all the members of the business, artistic and technical design team during various stages of the production process and after the play finished its run to get some retrospective assessments. While many questions were asked in response to our observing some activity, basic questions included:

1. When did you get involved in the process?
2. What activities are you involved with over the course of the production?
3. Who do you interact with and for what purposes?
4. How do you ensure you are on track with your designs (acting, business process)?
5. What are the biggest challenges that you face?
6. What are the main things that could go wrong?

5. The theatre and play process

Designing and producing a play can be segmented into five basic phases as indicated in Fig. 1. We see Phases 1, 2 and 3 as setting the stage for the theatre company’s strategic positioning as well as the specific play’s design and development, thereby providing an environmental context. They are important stages in the process but not central to the purpose of our interest in designing the service experience. We describe these three phases briefly while the focus of our investigation is on Phases 4 and 5.

5.1. Phase 1: vision and strategic focus

Phase 1 of the process involves the definition of the playhouse’s purpose. The overarching definition of the playhouse’s purpose defines the scope of plays that are consistent and could form the basis for the theatre company’s season, in particular the genre of plays staged. This is the most strategic level of decision-making and entails discussion and evaluation with a variety of stakeholders including the theatre company’s Board of Directors, General Manager and Artistic Director. Deciding the theatre’s purpose is such a fundamental decision that any change would likely result in changes to the key management positions within the playhouse. In addition, since a significant component of revenue and sponsorship is derived from clients and customers with longstanding theatre affiliation, a change in the play’s genre would fundamentally alter the customer base. The theatre company we studied focuses exclusively on contemporary plays and up and coming playwrights.

5.2. Phase 2: play selection and fit

The range of plays that form the annual package is strongly influenced by the vision and by constraints imposed by theatre’s physical facilities. Approximately 1 year prior to the season, the rights to produce a number of appropriate plays are negotiated with the various playwrights and their agents. In planning the
season, the theatre works under a number of constraints. Stage size limits the number of actors possible in any one scene and, based on an understanding of the season subscribers, the balance between comedy and drama is determined. The theatre’s capability to develop and mount complex and large-scale productions is limited. A variety of technical factors and their costs (scene changes, props, costume, lighting and sound) are considered in determining the play’s overall complexity. Finally, the number of available show dates, the revenue potential and the preliminary cost estimates for the play’s rights, the design costs and the actors’ wages help to determine whether the budgetary constraints imposed imply a solo, joint venture or even the infeasibility of production. While there is a preference to be sole producer of the play to give the company a greater degree of artistic freedom and control, the Belfry engages almost exclusively in co-productions to be able to stage more expensive and elaborate production projects.

5.3. Phase 3: personnel selection and planning activities

Once the plays have been decided upon, some preliminary marketing efforts are undertaken including specifying show dates to the public. In addition, the play’s Director is hired on a contract basis. The Director decision is based upon several key factors including a fit between the theatre’s mandate and the Director’s approach and reputation as well as his/her availability. During the negotiation process, an indication of the play’s budgetary constraints is provided to the candidate to ensure commitment. Because of his interest in the production and experience with many of the actors, the Belfry’s artistic director assumed the Director’s role in this case. He typically directs one or two of the season’s plays.

The Director then took control of all further decisions subject to budgetary constraints. He was responsible for submitting a final budget estimate for approval by the Production Manager and ultimately managing to that budget. One of his first decisions was choosing the Set Designer, who was made aware of the preliminary set design budget constraints. Since set design and development takes a considerable amount of lead-time, a major error causes considerable disruption and potentially disastrous cost overruns. The Belfry’s Production Manager noted that the majority of major previous failures (defined as either budget overruns or delays that affected adequate rehearsal time) originated from disagreements and disputes between the Set Designer and the play’s Director, most commonly over cost overruns for set design and costumes during the play’s design.

A considerable amount of communication occurred between the Set Designer and the Director to ensure that the two shared the same image and vision for the play. In this case, the Director had visited the coast of Ireland, where the play was set, to develop a sense of the setting while Ted had visited the theatre to get a sense of physical constraints of the stages. Ted also conducted additional background research on the most appropriate colours, textures and set designs to be consistent with the playwright’s and the director’s vision.

Even with this shared communication effort, many designs for the scenes are altered between the initial and final drawings. Paper-based representations of the set do not always convey the complete picture. As various design configurations were offered, they were accompanied by budget estimates, which were reviewed in relation to preliminary estimates. The Set Designer was also responsible for indicating potential problems between the set design colours and pre-specified costumes and later on with the detailed submissions from the Costume Designer. Based on anticipated lead times for the stage rehearsals, construction start dates for the sets were established and actual construction management became the Set Designer’s responsibility. Even with this pre-planning, there are times when set changes are made after construction has commenced. For this play, initial painting procedures left noticeable ripples in the material. Despite the cost, it was deemed significant enough to warrant replacement.

Concurrent with the decision on Set Designer hiring, preliminary discussions occurred on the Director’s preferred choice of actors. For this play, four actors were selected by the Director while five others went through the audition process. Detailed information on the chosen actors was assembled (e.g. height, weight, skin allergies) and eventually provided to the Costume Designer. Actors were informed of their selection and provided with material for
preparation, which went far beyond simply the lines to rehearse. In this case, each actor was given a tape of local dialect and accent and was asked to familiarize themselves with it prior to rehearsals. Nonetheless, most of the actors did not have time to prepare for the play prior to the start of rehearsals, which was fine as this can make the subsequent visioning process easier.

The final major contracting effort centred on the Costume Designer. The Set Designer and the Director agreed on the appropriate individual to choose. Because of the historical nature of the play, extensive research was necessary to ensure authenticity. Sketches and budget estimates were forwarded to both the Director and the Set Designer for comment and approval. Costumes can be very elaborate, require long lead times and entail a major portion of play’s budgeted expenditures although in this case most could be acquired at local thrift stores. As a general rule, more elaborate costumes negatively impact on the funds available for set design and props.

5.4. Phase 4: developing and rehearsing the artistic and technical elements

5.4.1. The introduction

The Belfry operates on a 1-month production cycle. Four weeks prior to show date, the entire group – designers, director, actors – as well as all technical support personnel (lighting, sound, props, carpenters) met on site for a theatre industry ritual referred to as “meet the donuts” (scones and muffins are also served depending on local custom). This is as much a social occasion as it is a chance to read through the play for the first time. All members of the team were introduced, administrative issues dealt with (e.g. timing of social gatherings, dates for photo shoots, location of dining establishments, union rules, etc.) and a tour of the stage facility was conducted. A status report on stage construction and costume sketches was also provided.

The “first read” represented the initial chance the actors had to hear the play in its entirety.

Additional potentially useful information about the playwright and the play’s setting (geography, time, context, etc.) was also discussed and a brief video was shown of the historic setting in Ireland. The playwright’s history was told, which provided further imaging and visioning of what was intended. In addition, the sketches of both the set and the costumes helped to convey images of what the final product would look like. With the production and business staff present, the Director then asked the actors to read through the entire play without interruption. This “first read” provided the theatre staff with valuable information on timing (the stage manager kept notes and used a stopwatch), which would be used by a variety of technical personnel to establish cues and by marketing personnel in timing information on intermission. It even served to ensure that a different version of the script was discarded.

5.4.2. Achieving independent technical perfection

5.4.2.1. The actors’ roles. The following 3 weeks can be considered as a constant effort to ensure that specific details for the play are ironed out. For a number of days after the “first read”, the actors simply read their lines and explored their roles in detail. None of these involve activity on stage – all took place in a rehearsal hall. Actors’ accents were explored, different mannerisms were investigated and movements were tested. Striving for authenticity, the Director called for specialists to help. This included: an accent coach for all the actors, a licensed doctor to assist the actor playing the physician’s role for proper examination procedures, and knowledgeable advice on how a “cripple” would walk. Occasionally, the Director called for a prop to be used during these rehearsal sessions. Often, this required a substitute because the play’s props had yet been secured. During all these sessions, the Director drew out the actors’ and technical personnel’s expertise, constantly seeking their advice and input. For example, a particularly amusing experiment involved figuring out how one character would break three eggs over the head of another. In the space of 15 min, 20 experiments took place with various levels of egg “hardness” being tested along with various locations on the head and from a variety of sitting and standing positions. Involving all those associated with the play in this problem solving exercise led to rapid achievement of an optimum approach which was communicated to all concerned for future rehearsals. The process, reflective of the entire rehearsal period, also served to promote a culture of innovation and creativity. Eventually, the constant experimentation and script rehearsals resulted in total actor role-immersion.
Actors began referring to each other using their stage names even when not in rehearsal.

5.4.2.2. The designers’ role. Initially, the designers (set, costume, light and sound, props) worked independently to develop their respective design elements. Using the script details as a guide, they worked off-site but did have limited access to the rehearsal hall to better understand possible constraints. Each of these technical designers uses a customized “plot” to organize their work and to maintain documentation over time. “Plots” are theatre terms for mechanisms created to organize designs and can be thought of as a form of a dynamic procedures manual but with many additional descriptive elements. The costume plot, for example, contained such details as who is on stage at any time, the time actors had available for costume changes, whether the scene was at night or day, and other elements that impacted costume choice. The plot was continually updated based on communication from the actors, rehearsals and experimentation outcomes. In a similar manner, sound and light levels were tested from a variety of audience-based positions while the location of props was examined from different angles. To ensure that the props were complete and accurate, the Set Designer and the props coordinator went through the script line-by-line and scene-by-scene and reached agreement on what was required. The props themselves were revised considerably over the course of rehearsals as extensive web-based and museum research was done to ensure authenticity and accuracy. Set designs and changeover mechanisms were tested off-stage for functionality, simplicity and speed. Scene changeover times were reduced in several cases to avoid dead air time. Lighting intensity, shadows and focus were matched against the script and special effects were tested for timing and effectiveness. Appropriate levels for each element were fully documented and saved for future reference.

While these technical elements generally operated independently, there were many occasions when the designers were actively engaged in problem-solving during the actors’ rehearsal process. Whenever the actors interfaced with the stage’s physical elements and props during the rehearsals, the technical personnel were encouraged to be present and to offer alternative approaches to how things might be made to work. Similar to the process used for the egg-breaking scene, the positioning of a boat on stage, the size of a bed and the height of a bedside table all involved experimentation and collective creative problem solving. The involvement of all technical personnel during this process was very important. Changing the bed’s size or the boat’s location had an impact on lighting and almost all set changes impacted multiple designers.

Despite the seemingly independent nature of their work, there was considerable informal communication among the various technical designers and between the designers and the Director. In addition, there were more formal communication mechanisms. Weekly production meetings brought together all of the technical players. This formal process, with documented minutes, provided an opportunity for the Director to meet with the technical staff and discuss critical issues. The meetings were chaired by the Production Manager, although nothing proceeded without the Director’s final approval. Progress on the various technical elements was reviewed, and ideas and suggestions for key problem areas were discussed. The Production Manager and the Director constantly sought advice and counsel from all in a problem-solving mode. In addition to weekly production meetings, daily rehearsal reports (see Appendix C), permitted communication between the actors/Director and the technical designers about issues and challenges that arose during acting rehearsals and decisions that were made. The Stage Manager was responsible for documenting and distributing these notes.

5.5. Phase 5: successive integration of the elements

Prior to gaining access to the stage hall, a “tech” rehearsal was conducted using stagehands as stand-ins (walkers) for the actors and impromptu props to represent the physical setting. The “tech” rehearsal was the first opportunity to integrate the play’s technical components and to assess the tech levels together and led to significant modifications of the technical design elements. For example, it was a direct result of the “tech rehearsal” that the main stage backdrop was determined to be inadequate. It was also the first opportunity to test the running of a projector
on silk screen to show a film that was involved in a scene.

The play was next brought together in what theatre companies refer to as the “stumble through”, the first time in which the play’s various scenes and acts become integrated. The stumble through provided an opportunity for true integration of the play’s acting and technical content and again led to significant changes to stage directions. This leads to another round of rehearsals to incorporate any modifications and to correct errors revealed during the stumble through. Up to this point, the acting component had still not been integrated with the technical aspects. Most of the technical adjustments after the stumble through reflected alterations to timing and cues for music and sound effects, which could only be finalized once the actors speech and movement pacing was gauged.

The play was put through two major rehearsals during the final week: the Tech dress and the Full dress. Both rehearsals used the actual props, scenery, lighting and sound system for the first time. In other words, it was the first time that the technical and acting components of a play were brought together in the real environment (minus the audience). Modifications are made and incorporated into the script (if permitted) and, more importantly, the technical staging, particularly timing and cues for light and sound levels, is perfected. The constant modifications and adjustments to all technical elements (sound, light, costume, prop location) continued and were eventually captured in the “blocking” (taped indicators) of all prop locations and final sound and light “plots” (detailed notes and cues) for each act and scene. These formal “plots”, essentially procedure manuals, represented the knowledge codification of 4 weeks of trail and experimentation that could be used by any technical operator.

The play moved to the live audience in two steps: the two dress rehearsals (paying customers but generally friends and family) and the opening night (mostly season ticket holders and critics). During the dress rehearsals, the Director took extensive notes throughout the performance indicating areas where improvements could and should be made. These problem areas were discussed with the actors in a meeting following the rehearsals. Again, there was constant search for perfection using planned experimentation that consumes the last 2 days before opening night.

After opening night, the potential to change was dramatically reduced and only minor tinkering was possible, despite any comments that may come from the critics. The Set Designer departed for another job. The Director likewise moved on to other work, his only involvement being receipt of the daily rehearsal reports outlining the problems that have occurred on the day-to-day basis of running the show. The Production Manager shifted his attention and effort towards the next play’s design, development and production, leaving the day-to-day running of the current play to the Stage Manager and the assistant sage manager.

6. Learning from theatre: critical elements of performance and experience success

Even though individual plays are unique in many respects, the play process, as illustrated in Fig. 1 (at a macro-level) and Fig. 2 (detailed for Phases 4 and 5), is highly standardized. The same core processes were used in a selection of New Zealand, Australian and US theatre companies that were either visited as part of our research or for whom the interviewed actors and designers had been engaged. Standardized processes help to ensure on-time delivery within a constrained budget. They also lend themselves to management research and inferential insights that can assist with a better understanding of how to design performances and deliver memorable customer experiences. It should be noted, however, that even a standardized process does not guarantee a play’s popularity. A superb process can only mitigate the impact of a poor choice of plays in the same way that the best process technology and management will not salvage a fundamentally flawed product design. Despite that caveat, we are able to use the theatre play process to draw some important implications for management and opportunities for further research. In all cases, we define performance success as minimizing the potential for disruptive influences that might prevent a theatre audience from becoming immersed in the play itself (e.g. awkward light and sound timing, disruptive scene changes, dead air, etc.) and hence maximizing the potential for creating a memorable experience.
6.1. Extensive reliance on integrating mechanisms

Throughout the play’s selection and development, integrating mechanisms – actions that integrate the business, technical and artistic elements – pervaded the performance design process. From the outset, the play’s selection of The Cripple of Inishmaan incorporated both a financial (business) and artistic...
(mission highlighting emerging contemporary playwrights) perspective. The Director’s vision of the play led to the appropriate selection of actors and technical designers. Budget constraints played a large role in the development of sets and acquisition of props for the show.

The integrating mechanisms were critical factors in the detailed level of design where acts, scenes and lines are mastered. This began with the initial social gathering and continued for the 4-week period with the various formal events, including the stumble through, the dress rehearsals and the shared rehearsal reports. We noticed on several occasions the iterative process employed to achieve integration. For example, lighting works independently, then integrates with sound, then works independently again, attempts another integration with sound and perhaps actors and so on. This iterative process of independent effort followed by incremental integration continues up to the last dress rehearsal. Similarly, the actors rehearse their parts, then incorporate some costumes or props, continue to rehearse independently and then incorporate key elements of sound, light or other props. In this way, there is an incremental and progressive approach to integrating the artistic and technical elements.

Since the actors have very prescribed time schedules (a schedule of all rehearsals and technical tests was handed out on the first day), the rehearsal reports represent a key element in their ability to communicate from the artistic side to the technical and business side. Because of their importance as a communication tool and as an integrating mechanism, all the rehearsal reports (an example is given in Appendix C) for this play were evaluated for content analysis and classified into critical categories as shown in Fig. 3. Classification categories included clarifying or descriptive information about what shape or form the technical elements are (e.g. wrapped candies inside a small paper bag) (39.3%), adding to the itemized list of technical requirements (e.g. ADD iodine bottle for the doctor’s bag) (23.8%), calls for further discussion, meetings or research (e.g. can we talk about the lead pipe?) (18%), immediate provision requests for props and costumes to be used during acting rehearsals (e.g. boots for Billy) (9.8%), comments related to safety concerns or the potential for a safety-related issue (e.g. Billy leans heavily on the wall beside the bed) (5.7%) and the occasional thank you for a job well done (3.3%). Precision and details around the technical elements dominate the content analysis, an example of the drive for performance perfection and authenticity. It also indicates the directional flow whereby the artistic requirements generally drive the technical specifications. Put into a management context, the needs of the front line service providers drive the requirements for technical support.

Proposition 1a. The use of formal integrating mechanisms (planning meetings, rehearsal reports, etc.) is related to performance effectiveness.

Proposition 1b. The use of formal integrating mechanisms is related to performance efficiency.
6.2. Improvement through continuous experimentation

A constant element throughout the play’s design and development was the frequent experimentation. Each scene in the play was practised and rehearsed using a variety of positions, voice inflections, lighting situations and sound effects. The physical position of props is constantly adjusted. One scene, a night scene requiring a boat on stage, tended to lead to the actor’s face being obscured from part of the audience’s view. The boat’s position was modified many times before the least damaging position could be found and “blocked”. In another case, the Director called spontaneously for an “Italian”, a method of speed delivery that saw the actors recite their lines as quickly as possible. The 2-h play was read in less than 45 min. This was an experimental approach used to reveal potential improvements in pacing and timing. Only when all suggestions had been tested and every avenue explored was the final approach established and eventually codified into a formalized document by the stage manager (the plot) that became the operator’s guide for the actual live performances. The overall objective with all these activities is to find the best performance to satisfy the audience while maintaining the play’s integrity.

Proposition 2a. The frequent use of experimentation is positively related to performance success.

Proposition 2b. The later that the experimentation results are codified into formalized procedures, the more the experimentation process will positively impact performance success.

6.3. Shared responsibilities/encouraged contributions

Throughout the process, we witnessed a considerable amount of shared responsibility and encouraged contributions. In terms of shared responsibility, the first meeting we observed was between the Set Designer and the Props coordinator on day one. The two went through the scripts line-by-line to identify the required props and possible challenges and sources. Later, the Props coordinator and costume designer met to look at design issues that would impact each other’s work.

No idea was ever summarily dismissed. Actors, technical staff and invited specialists were encouraged to share their views on how a scene could be improved. The experimentation would not have been nearly as effective without this approach. It also contributed to encouraging contributions, innovation and creativity. Early on, the Director frequently and systematically asked actors what they thought the character would behave in a certain situation or how they felt about other characters. The process of reflection combined with experimentation greatly improved the performance over time.

Proposition 3a. Shared problem solving supports both effectiveness and efficient design.

Proposition 3b. Experimentation supports improved performance design and innovation.

6.4. Continuous striving for authenticity/integrity

Another impressive element of staging the performance was the extent to which authenticity and integrity was pursued. The play was set in 1934 on a small island off Ireland’s West coast. The Director purposefully visited the village, recorded voices from the “natives” and captured the essence of the area with a series of photographs. He also secured a rare copy of the documentary movie that was central to the play’s theme. His initial comment prior to the first read through of “lots of rocks and peas” helped establish the play’s atmosphere of frugality and barren existence. Considerable research was performed to understand and replicate, to the best of the theatre’s ability, the costumes, mannerisms, accents and appearances of the people and area. From the authentic period newspaper with the picture of a young Hitler on page 4 to furniture that was consistent with the period to the rustic labels on the many cans of peas in the general store, no effort was spared to be authentic and helped to immerse the audience in the setting. This search for authenticity is captured in the comment in the rehearsal report provided in Appendix C. Proposition 5 requests a short stool for future use in one scene. Although the cast had one, it was thought to be “too good”. In another case, the Doctor in the play wanted to know if he was married as it would signal the need for a wedding band and the need to search for an authentic reproduction. Initially, the Stage manager
did not want to use real eggs cracked over Bartley’s head but the Director insisted that it was critical for authenticity and the scene’s integrity. The desire for consistency and authenticity went from large, obvious technical elements such as the sky or rock wall (set design) to the smallest detail including candy wrappers and the Bible cover (props). Making the setting, costumes and accents as authentic as possible was also a critical factor in getting the actors to better understand their role and develop their character to the fullest. During one of our post-production interviews, the Director commented that the theatre’s audience was sophisticated, well travelled and well read. Errors in scenery, accent, props, etc. could easily be noticed, would provide negative cues to the audience and would interfere with the play’s impact.

**Proposition 4a.** Authenticity and consistency of the technical elements supports the performers in assuming and performing their role.

**Proposition 4b.** Authenticity of the performance enhances the customer experience and allows them to become more immersed in the service experience.

### 6.5. Total role immersion

From the start of the first rehearsal to the opening night, we witnessed a transformation from the actors playing a role to actors being the role. There was complete immersion and projection displayed by all the actors as they sought to become the person they were portraying. When not called for in a scene rehearsal, actors were observed socializing with their peers and often practising their lines for an upcoming scene. As an illustration of this total role immersion, seeing one of the actors shopping in his spare time, one researcher called out to say hi but only got a response when the actor’s stage name was used.

Creating the culture of role perfection and immersion was a critical strength of the theatre design process. It started with the initial read through and continued through the 4 weeks of rehearsals. The actors became the people in the play, dressing, walking and talking as if they were their stage persona. We note that the training for the service role in the theatre was not a cursory, half-hearted effort. Four weeks of intensive, continuous, sometimes, repetitive rehearsals were required for a 2-h stage performance.

**Proposition 5.** The more that actors assume their immersive roles (as opposed to “acting”), the greater the connectivity with the customers and the more likely for a positive customer experience.

### 6.6. The director as facilitator

The Director played a critical role in the performance success by balancing business and artistic interests in a careful juggling act. Our observations and discussions with theatre experts identified three traits shared by successful Directors: the ability to be a coach/facilitator as opposed to a micro-manager; the ability to visualize how a scene will project from the rehearsal hall (where the majority of rehearsal work transpires) to the performance stage; and the ability to recognize the budget constraint realities. To be a successful coach/facilitator, the successful Director must incorporate motivational factors. Designers and actors (like many front line service personnel) are relatively poorly paid despite their importance to the play’s success. Instead, their motivation rests upon pride of work and a desire to be associated with a successful production. Successful Directors recognize this and limit their interference in the actors’ and designers’ decision-making processes. Directors project a vision for the play but are careful to avoid dictating how that vision will be accomplished. They provide guidance and suggestions, not direction, despite the job title.

When dealing with technical staff, responsibility is routinely delegated, although the Director’s hand is never too far away. For example, as we observed, the weekly production meeting appeared at first to be run by the Production Manager. He set the agenda and he was directing the flow of conversation with the various technical designers providing updates. However, whenever the group discussion moved towards a decision, there was a noticeable glance in the Director’s direction for ultimate approval.

Excellent Directors have the ability to identify which problems revealed during the stumble through and/or tech rehearsal need to be corrected and how they might be resolved so that the performance will be optimal under actual stage conditions and to make the necessary tradeoff decisions. For example, despite expert coaching and exposure to movies and audio clips of the accents, the actors’ started to become
frustrated with their inability to master the characters’ Irish accents. The Director recognized that further refinement would be unwarranted, as the situation had reached the point that it was interfering with mastering the lines. On the other hand, the Set Designer’s problems with the stage setting’s wrinkles caused the Director to approve the additional cost of repainting. Understanding this balancing act seemed to rely upon experience and judgement rather than any set formula.

Finally, the Director operated within the constraints of a set budget. The play’s revenue potential is fixed and, hence, to preserve margins, a target cost of production must be maintained. There is room to move expenditures from one category to another (e.g. set design to props) but the total cost of production must be maintained. The Director’s ability to enlist the support of the key technical Directors in helping to meet this goal without the appearance of infringing upon creative ability is paramount.

**Proposition 6.** *Leadership from the Director is central to performance success.*

7. Service experience design research agenda and study limitations

This research represents an initial step in moving away from goods-based design models to an approach that recognizes the messy process that designing service performances and delivering memorable service experience entails. However, further research is needed to test both the applicability and generalizability of the theatre approach across varying service contexts. For example, the theatre model may apply more to situations where the customer is “in the service factory” or there is a more obvious “performance”-related role for the service provider than when the service is provided from a remote location or where competency (e.g. brain surgery) is a stronger correlate of satisfaction or where the service provision is done in the absence of customer contact (e.g. industrial cleaning).

Additional detail and methods of operationalizing the framework and its core components is needed. Research is called for that examines each component of the framework illustrated in Fig. 2, both in terms of how they should be conducted as well as how they should be integrated with other elements of the model. Many of the propositions we have listed would require new measurement instruments that need testing and refining before cross-sector generalizations would be possible.

The theatre approach attempts to avoid post-introduction flaws by integrating systematic testing into the design process and more research is needed to examine its applicability in wider service contexts. The apparent complexity in designing and delivering a service experience requires research approaches that complement the current focus on cross-sectional surveys of successful versus failed introductions. Longitudinal approaches are more suited to understanding the challenges managers face over the course of the design and implementation process. Social network analysis would be a particularly effective technique for understanding how those responsible for operations, marketing, human resource management and information systems decisions influence the service design process.

Finally, we have focused this research on steps taken by service experience designers to maximize the opportunity for achieving customer immersion and positive experiences in a context where absorption is the norm. While the theatre company does many things to ensure the theatre patron is prepared for the play (notice of intermission timing, coarse language, etc.), live plays of this nature largely focus on a passive audience. The performance design process is geared towards prevention of annoying distractions and maximizing the opportunity for actor role immersion to filter to the audience. Design processes for other types of service should be examined to see if the theatre model can be more broadly applied. Recent research into the use of student centred active learning as a means of achieving educational immersion suggests that the same process witnessed in theatre play design and development could apply to a much larger number of service situations than originally thought.

**Acknowledgement**

We are thankful to Dr. Jennifer Wise, Faculty of Fine Arts, for providing this background historical information.
Appendix A. A brief history of theatrical plays

Generally speaking, plays have a recorded history of over 2500 years. The Greeks are considered to be the originators of the art form although productions were not commercially oriented. Plays were produced by the wealthy (or in some cases by the State) and performed publicly almost as a form of civic duty. The fact that it helped prevent uprisings, keeping the peasants occupied and amused, did not escape those footing the bill. It was extended into Roman times with almost daily performances provided at no cost. History has recorded this as a planned approach of Nero and Caligula, among others, to keep peace in the realm.

The consequences for poor performances in both the Greek and Roman times included serious fines and prohibitions imposed to prevent further productions from those concerned.

Plays for commercial purposes only surfaced as an organized activity during the English Renaissance period. Plays were produced for paying audiences. Performers would often be asked to perform at Court in front of the Monarch. To be invited to do so had both negative and positive consequences. It did draw time and effort away from the public arena, the prime source of commercial revenue. However, a successful performance in front of the monarch yielded additional money for costumes and props from the Master of the Revels and the monarch would also show his/her appreciation in the form of financial remuneration. It was also considered a privilege and honour, which could be used to promote further public performances. Moliere, for example, had one and only one opportunity to perform in front of the monarch and made maximum use of the opportunity.

The recorded consequences during the commercial era were strictly financial. A poor performance yielded lower audience attendance and hence financial ruin. In France, there are recorded incidents in which the monarch actively dissuaded people from attending a “poor” performance – one they did not like or appreciate. The Master of Revels, an appointee of the Crown, did have the authority to shut down a playhouse, ostensibly for plague-related hygiene and public safety concerns. There is, of course, no guarantee that this authority was always used for health risk management purposes. During the 18th Century, Monarchs stopped attending public performances. This almost led to the ruin of several playhouses, which depended on the aristocracy to be seen with Royalty. The loss of Monarch patronage meant a reduced need for the wealthy to attend the Playhouse. Playhouses only recovered commercial viability when the genre of plays was moved downscale to a level appreciated by the masses.

Appendix B. Key personnel and roles of “The Cripple of Inishmaan”

Performers

<table>
<thead>
<tr>
<th>Performer</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meredith Bain Woodward</td>
<td>Eileen</td>
</tr>
<tr>
<td>Bernard Cuffling</td>
<td>Johnny</td>
</tr>
<tr>
<td>Stephen Holmes</td>
<td>Billy</td>
</tr>
<tr>
<td>Mathew Hoos</td>
<td>Bartley</td>
</tr>
<tr>
<td>Brian Linds</td>
<td>Doctor</td>
</tr>
<tr>
<td>Nicola Lipman</td>
<td>Kate</td>
</tr>
<tr>
<td>Jody Kay Marklew</td>
<td>Helen</td>
</tr>
<tr>
<td>Margaret Martin</td>
<td>Mammy</td>
</tr>
<tr>
<td>Jamie Norris</td>
<td>Babbybobby</td>
</tr>
</tbody>
</table>

Production

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roy Surette</td>
<td>Director</td>
</tr>
<tr>
<td>Nancy Bryant</td>
<td>Costume Designer</td>
</tr>
<tr>
<td>Ted Roberts</td>
<td>Set Designer</td>
</tr>
<tr>
<td>Marsha Sibthorpe</td>
<td>Lighting Designer</td>
</tr>
<tr>
<td>Dick Stille</td>
<td>Assistant Director</td>
</tr>
<tr>
<td>Meredith Macdonald</td>
<td>Stage Manager</td>
</tr>
<tr>
<td>Lisa Cochran</td>
<td>Assistant Manager</td>
</tr>
<tr>
<td>Noel Miles</td>
<td>Apprentice Stage Manager</td>
</tr>
<tr>
<td>Ian Rye</td>
<td>Production Manager</td>
</tr>
<tr>
<td>Karen Levis</td>
<td>Wardrobe</td>
</tr>
<tr>
<td>Andrew Tugwell</td>
<td>Technician</td>
</tr>
<tr>
<td>Jeremy Gordaneer</td>
<td>Props</td>
</tr>
<tr>
<td>Shawn Derksen</td>
<td>Technical Director</td>
</tr>
</tbody>
</table>

Appendix C. Sample rehearsal report of “Cripple of Inishmaan”

Distribution: Roy, Mary, Ian, Shawn, Andrew, Jeremy, Karen, Marsha, Ted, Nancy, Meredith, Lisa, Noelle, Stephen, Ian (15).
C.1. Report #6

General

1. The timing for today’s run were ACT 1 1:17:28
   ACT 2 1:03:29.
2. Could we plan a props meeting for sometime this week?
3. There will be a sound meeting on Monday, January 8, after rehearsal.

Costumes

Props

1. Please ADD 2 smaller rocks of the same format as the big ones.
2. We would like to have corks in both the whiskey bottle and poteen bottle.
3. Can we chat about the lead pipe?
4. Please ADD 1 chair for Mammy’s room (we have it).
5. Please ADD 1 short stool for Mammy’s room (we have one but it may be too good looking).
6. We will use the short stool and the added chair for Mammy’s room and for the scene in the church hall.
7. Thank you for the bigger cans and the shorter sack.
8. The legs on the shop table will need to be strengthened considerably please.
9. Could we please have the Hollywood mirror attached to the wall. We have marked the placement with spike tape.
10. We would like the Fripple Frapples to be in their own package and inside a small paper bag. Bartley will open the package and eat some Fripple Frapples.
11. The chimney on the amp is getting loose. Could you check it for us please.
12. Could we please have some more Johnnypateen notebooks. Two or three would be okay.
13. The added chair for Mammy’s bedroom needs to have its back looked at. It is wobbly.

Set

1. Could we please take a look at the brake on the bedside of the Hollywood unit? It has taken some abuse recently and may not be functioning to its full capacity.
2. FYI – Billy leans heavily on the wall beside the bed in the Hollywood scene.
3. Could we please have a cue light installed backstage for early next week. Meredith can tell you where and it will need to be operated from the SM table.

LX

Sound

1. We would like a simple recording system set up in the rehearsal hall please.

   - Thank you
   - Lisa and Meredith or
   - Meredith and Lisa or
   - Stage management in general

References


Evans, J.R., Lindsay, W.M., 2002. The Management and Control of Quality, 5th ed. South-Western, Cincinnati, OH.


