INDIAN INSTITUTE OF MANAGEMENT KOZHIKODE

Working Paper

A Pedagogical Schema of Storytelling for Managers

Anupam Das[1]

[1]Associate Professor, Humanities & Liberal Arts in Management, Indian Institute of Management Kozhikode, IIMK Campus PO, Kunnamangalam, Kozhikode, Kerala 673 570, India; Email - anupamdas@iimk.ac.in, Phone Number - 0495-2809437

A Pedagogical Schema of Storytelling for Managers

Abstract:

Most postgraduate students in Indian Management Schools (and possibly in business schools in many other parts of the world) have no or very little knowledge of effective storytelling. Yet, one's ability to share personal or professional information with others in a narrative form was found to be highly rewarded in business. This pedagogical schemais conceptualized to helpmanagement studentsimprove their narrative skills. In doing so, the students were instructed to compose a compelling narrative to position and advertise a product after analyzing a advertisement case study. To achieve this goal, the activity makes use of the familiar management case method and relies primarily on theworking memory this creates,for the narrative. Simultaneously, the students are also introduced to thetechniques of creating a compelling three-act narrative through semiotic interpretation of a limited set of images. Thus, the goal of the pedagogical activity is not only to help the students master the art of compelling storytelling but also to help them acquire successful strategies of branding through narratives.

Keywords: Advertisements, Case Method, Narrative, Storytelling, Working Memory

Introduction:

There are a number of strategies or modes for conveying knowledge in organisations. A partial list of knowledge sharing strategies that are generally used in organizations is –modeling (e.g., mentoring, apprenticeship, symbolic conduct), simulations (e.g., case studies, role playing, and technology-supported simulations),codified resources (e.g., manuals, SOPs, instructions, textbooks, memos or data bases), symbolic objects (e.g., map of an organization, logos, or a prototype car), and storytelling (e.g., narratives and anecdotes). Each of these modes serves different purposes and one can be more effective than others in some specific purposes. While modelling, simulations, codified resources, and symbolic objects are frequently used in organizations for knowledge sharing, storytelling is frequently overlooked in many organizations. Yet the importance of storytelling in business organizations has long been recognized and documented (Snowden, 2000). In fact, sharing experiences through stories is emerging in various professions as a powerful way to exchange and consolidate knowledge.In his 2018 annual letter, Amazon founder and CEO Jeff Bezos repeated his rule that PowerPoint is banned in executive meetings. In his letter, and in a recent discussion at the Forum on Leadership at the Bush Center, Bezos revealed that "narrative structure" is more effective than PowerPoint. According to Bezos, new executives are in for a culture shock in their first Amazon meetings. Instead of reading bullet points on a PowerPoint slide, everyone sits silently

for about 30 minutes to read a "six-page memo that's narratively structured with real sentences, topic sentences, verbs, and nouns."[1]

Research suggests that sharing experiences though narrative builds trust, cultivates norms, transfers tacit knowledge, facilitates unlearning, and generates emotional connections.Storytelling has been used in nursing, business, education, and psychology to communication embedded knowledge. Effective stories can resolve conflicts and simulate problem solving. Past research has explored the role of storytelling in problem solving and action research (Mitroff& Kilmann, 1975), organizational renewal (McWhinney& Battista, 1988), socialization of new employees (Louis, 1980, 1983; Brown 1982), collective centering (McWhinney& Battista, 1988; Boyce, 1996), sense-making (Boje, 1991, 1995), learning (Helmer, 1989), and innovation and new product development (Buckler and Zien, 1996). Further these researchers argue that successful use of stories hinges on choosing the appropriate story-moments and being clear on the knowledge sharing goals. Yet, Management Institutions in India and seemingly in many other parts of the world do not have a well-structured curriculum to address this need.

In an attempt to understand whether there is any mismatch between the employers' expectations and students' skill sets, a management institute in India gathered feedback from the recruiters in the year of 2017 and 2018. Not surprisingly, many of these recruiters stated

---

[1]Source: https://www.inc.com/carmine-gallo/jeff-bezos-bans-powerpoint-in-meetings-his-replacement-is-brilliant.html

that the poor communication skills of a large number of the students act as a major constraint for the employers to recruit them. One of the key recruiting farms stated in their feedback that the students were not able to articulate effectively and seemed to be very week in verbal communication. Further, the recruiters mentioned that in business consulting, sales and marketingeffective articulation and connecting with the clients are considered to be the key factor. Thus, theycould notrecruit students with poor verbal communication skills even when the recruiters found that the students had sound knowledge of the desired subjects that they usually gather through textbooks, case studies, role-playing, and simulations. These modes are favoured in business organizations and in management schools perhaps because they value harder forms of knowledge that can be classified, categorized, calculated and analyzed.

A total of 32 recruiting farms offered feedback on the students' performance and many of them offered similar feedback. While there is no singular form of communication that can be considered to be more effective than others, well-formed narratives and anecdotes have traditionally been considered to be effectively passing on wisdom and culture. In recent years, there has been increasing interests by organizations and their leaders to the role and value of narrative and anecdotal information conveyed in the form of stories. This renewed interest in an ancient genre of communication is perhaps due to the recognition that knowledge cannot be always completely abstracted into categorical and abstracted forms and thus knowledge through other modes cannot be adequately conveyed. Instead, organizations in specific contexts seek communicative forms that synthesize rather than analyze. Well-told stories are such a communicative form. They follow certain structures(e.g., climax and anticlimax), through climax they generate listeners/readers curiosity, and finally through an anticlimax they deliver a moral of the story which can pass on knowledge or share experiences that are valuable for others.

To bridge the gap between the recruiters' expectations and the students' current communication skills, a pedagogicalmodel was conceptualized and a couple ofexperiments wereconductedto investigate how one can help improve the students' narrative skills. These experiments specifically emphasize on the process of storytelling in a business context. The primary objective of these pedagogical experiments is to help the students acquire the techniques of well-structured narrative and draw as well as retain attention of the listeners/readers to the objectives of the story. To explore this method, the paper uses the creative process of conceptualizing a story for an advertisement through a business case and a set of images.

Current Dominant Pedagogical Practices in Management Schools

The case method, a popular technique used for teaching life scenarios in law, medical and business schools has also influenced teaching practices in other school systems (Wassermann, 1994; Kimball, 1995). A largely controversial method (Kirkpatrick, 1987), it comprises an array of pedagogic practices (Dooley and Skinner, 1977; Bijapurkar, 2005; Krishnan, 2005).

Typically, the pedagogic objectives of the case method are intended to develop problem-solving, critical thinking, reasoning and cognitive skills of students, and thereby developing their professional expertise (Barnes et. al, 1994; Kimball, 1995, Rippin et.al, 2002). The case method teaching follows two variant traditions, one intended for skill development and the other for conceptual development (Kimball, 1995, Booth et. al, 2000; Rippin et.al, 2002). Since the process of creating a narrative through creative thinking and writing can be new to business school students, whooften come from a diverse educational background, with a majority having a degree in engineering (Koshal et. al, 2008),the text based case acts as a much-needed familiar foundation to introduce them to writing narratives through creative ideation. In management classroom settings, the case method is widely viewed as a dialectic method (Hammond, 1976), which involves a process of developing analytical reasoning by constantly challenging the arguments that one develops by placing oneself in the situation that the case details. This method is addressed as not being

synonymous to a Socratic method (Dixit et. al, 2005) since an instructor is viewed only as a facilitator and not as someone who develops an 'inner voice', the practice of this method still suffers in several institutions and has a strong cultural influence.

Though seen as a largely democratic method (Graff, 1954 as ref. in Manikutty, 2005), this can at times falter in cultures where the faculty is accorded a position of higher power, as in South Asia (Manikutty, 2005). With the influence of high-power distance (Hofstede & Hofstede, 2001; Manikutty, 2005), the role of an instructor (Andrews, 1954) might become that of an expert rather than that of a facilitator whose approval is sought not only during arguments and analyses but also in guiding the case to an accepted conclusion. This also becomes a significant criticism that is leveled against the case study method as the domination and influence of the classroom discussion by the faculty could bias the nature of the discussion (Andrews, 1954). Further, in such discussions, the classroom setting caters to an aggressive style, which is also rewarded as an evidence of classroom participation and is effectively seen as being masculine (Hofstede & Hofstede, 2001; Manikutty, 2005) in nature. This results in the dominance of a handful of extroverted students resulting in side-lining the opinions of the introverted group (Nussbaum, 2002).

The need to be culturally sensitive and at the same time responsive to a globally competitive environment shrouded with uncertainty, needs creativity (Karpova et.al, 2011) in order to deal with it strategically. Further, with organizations recognizing creativity as an essential success factor in an ambiguous, complex and dynamic business environment (Reiter-Palmon and Illies, 2004; Basadur and Hausdorf, 2010), the need to develop the creative problem solving ability is even more compelling. Such creativity becomes necessary to help students recognize and make use of opportunities that one might encounter in such environments (Ford &Gioia, 2000; Florida, 2002; Karpova et.al, 2011). Further, this also becomes invaluable to organizations (Brabbs, 2001; Karpova et.al, 2011), through several means such as intellectual property rights (Franham, 1994; Karpova et. al, 2011) and with the value of creativity in advertising being well known (O'Donohoe, S, 2013; Ogilvy, D, 2013; Mazzarella, 2003) the need for such creative processes in businesses is undeniable. The development of such creative processes in education is still only under development in the west (Katz, 2009; Sheperd, 2009;

Karpova et. al. 2011) and is at a nascent stage in the South Asian setting due to cultural issues stated earlier. This also needs a change in the process of teaching, where teaching creatively and teaching for creativity need to develop concurrently (Jeffrey & Craft, 2004) and this directly addresses the need to re-invent this popular case method (Dixit, et. al, 2005).

In order to address this immediate need, the pedagogy offered in this paper is to follow a student oriented approach in the ideation process of a case, where the goal is the process of a creative imagination coupled with market understanding to arrive at an optimal solution, with just a few guidelines from the instructor as opposed to the popular notion of the role of an instructor (Andrews, 1954). This places the control of the process with the students and balances biases of influence from the instructor as well as the extroverts in the class, thus creating an environment with lesser aggression and thereby even changing the system of student participation and its associated rewards as opposed to the current system (Manikutty, 2005, Hammond, 1976).

The method proposed in this paper tends to imbibe aspects of both the skill based and the conceptual development tradition (Booth et. al, 2000, Rippin, et. al, 2002), where the student is presented with opportunities to not only develop skills in narration and storytelling, but also allows for the students to explore and critique cases, develop sense making, critical ability and even their own frameworks. Further, the instructor moves between playing the role of a facilitator in the classroom setting and that of an expert and co-grader only in evaluation of the narrative responses to the case, thereby evaluating the thought process and not the response in itself.

Storytelling in Organizations

Storytelling has long been used in organizations as a tool to easily understand complex concepts and create culture (Weick & Browning, 1984; Wilkins, 1984). Since early 1980s, storytelling as a form of communication in organizations has evolved. It is being extended in sustaining brand management (Herkovitz& Crystal, 2010). After a comprehensive review of the existing body of literature on storytelling in organizations, one can broadly categorize them in four distinct areas – use of storytelling in organizational culture and change (e.g., Gill, 2011;

Robbins & Judge, 2012); use of storytelling in managing people (e.g., DeLarge, 2004: Barker & Grower, 2010); use of storytelling in marketing and brand management (e.g., Barker & Boyle, 2009; Singh &Sonnenburg, 2012, Spear & Roper, 2013); and use of storytelling in learning and development.
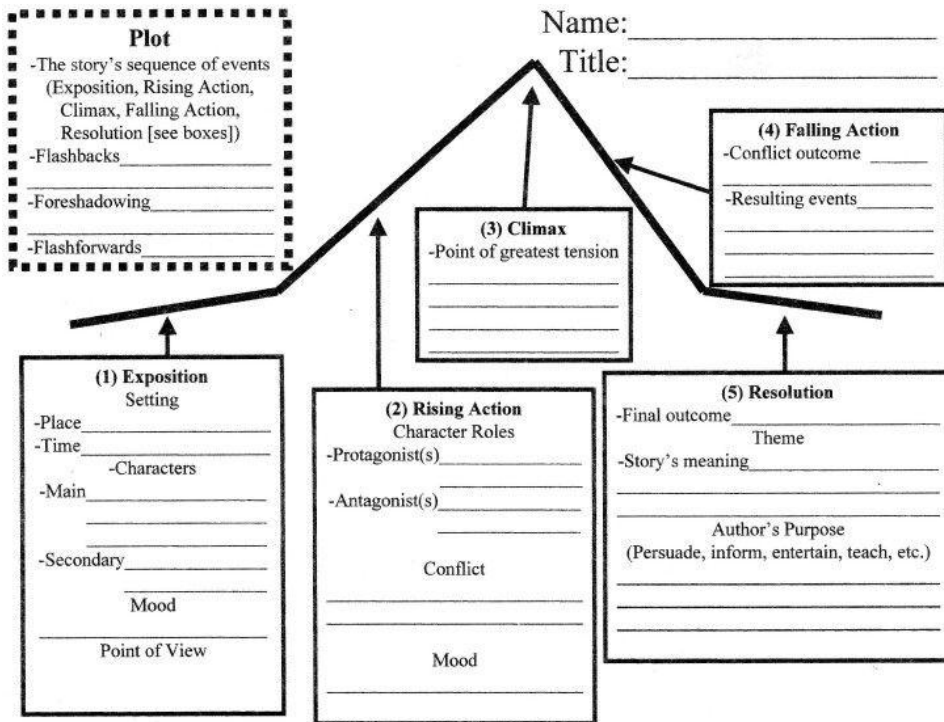
Use of Storytelling in Learning and Development

Either an unregulated or a moderated group discussion involving a business case study is a dominant form of teaching in many prominent business schools across the world. A business case is typically written stating the challenges and dilemmas faced by managers in contemporary business world. It usually takes a narrative structure (McLellan 2006). Cognitive research indicates that well-structured stories are generally more memorable than other forms of knowledge/information sharing methods and thus information ingrained in stories are easily retrievable. Stories can be used by experienced managers to mentor new employees, drawing from their past vast knowledge and experiences, and thus contributing to knowledge management (Swap, Leonard, Shields, & Abrams, 2001). Taylor et al. (2002) illustrate on the different forms of organizational storytelling based on aesthetic qualities. This distinction is made to help identify appropriate stories for specific learning goals and they have effectively argued how select stories can be used to teach management concepts. Further, Tyler (2007) conducted a naturalistic inquiry on the practical uses of stories among Human Resource Development practitioners of profit-making organizations. The study revealed that acceptance of storytelling was a big challenge in business organizations as it is often perceived as 'soft' approach to learning/training. Additionally, the study found that the use of positive stories was favoured even if negative stories gave significant lessons. Many HR practitioners also were of the opinion that the language used in the stories was very simplistic and there is a need to

develop a new stylistic pattern in narrative stories in business organizations. Volker, Phillips & Anderson, (2011) offered a story type matrix for distinguishing between different types of stories told within the organizations. They listed four types of stories – deliberate real stories, deliberate imaginary stories, non-deliberate real stories, and non-deliberate-imaginary stories. While deliberate stories were effective to make a point or guide an agenda, non-deliberate stories were for amusement but reflected the psychological perspective of the storyteller as well.

Cognitive Ability and Narrative Structure for Storytelling

Effective narratives comprise a tension often described as the reader's desire to know what happens next. Frensham (1996) states that narrative tension in screenwriting has three components namely; anticipation, uncertainty, and investment and each of these componentscan be created and mixed differently thereby determining the flavour of the story. A narrative schema that is commonly used in many fields including advertising is what is presented in figure 1.
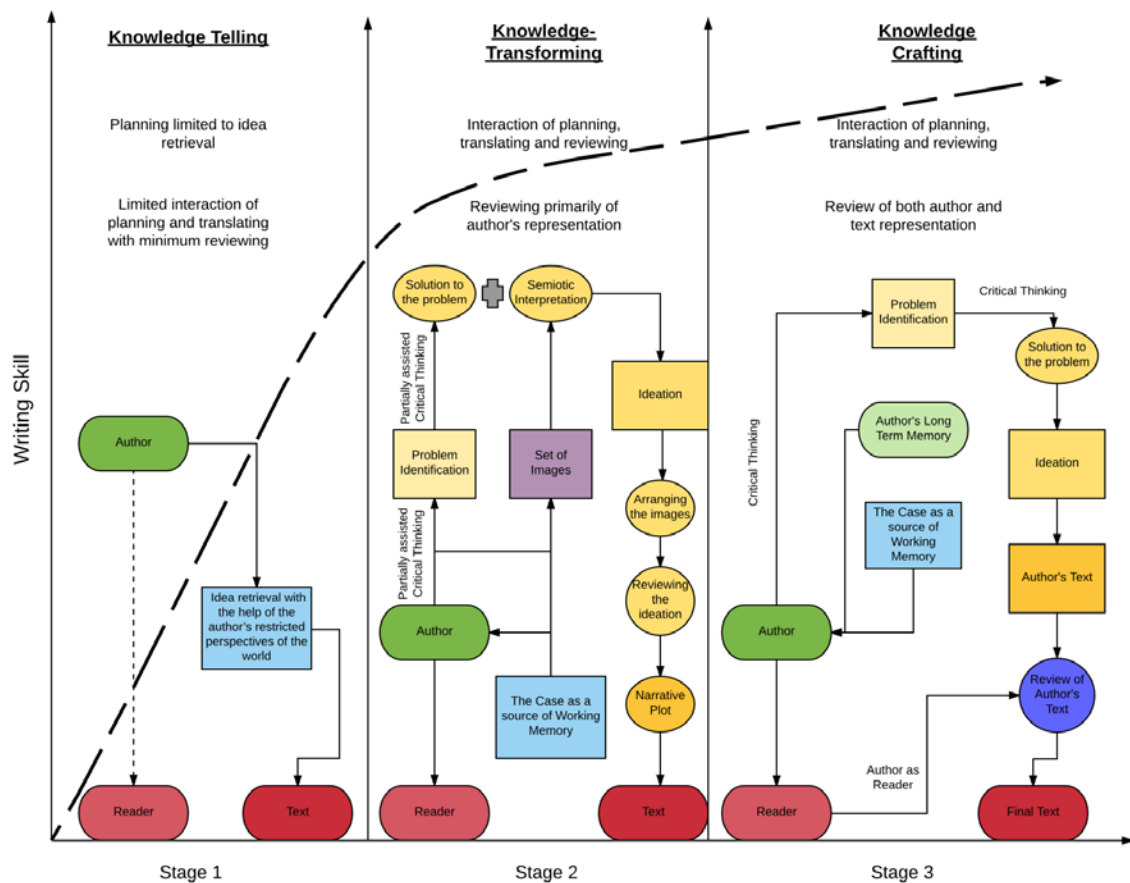
Figure 1: A schema of storytelling

Plot
-The story's sequence of events (Exposition, Rising Action, Climax, Falling Action, Resolution [see boxes])
-Flashbacks_____
_____
-Foreshadowing_____
_____
-Flashforwards_____

Name:_____
Title:_____

(4) Falling Action
-Conflict outcome_____
_____
-Resulting events_____
_____
_____

(3) Climax
-Point of greatest tension
_____
_____
_____

(1) Exposition
Setting
-Place_____
-Time_____
-Characters
-Main_____
_____
_____
-Secondary_____
_____
Mood
_____
Point of View

(2) Rising Action
Character Roles
-Protagonist(s)_____
-Antagonist(s)_____
_____
Conflict
_____
_____
Mood
_____

(5) Resolution
-Final outcome_____
Theme
-Story's meaning_____
_____
Author's Purpose
(Persuade, inform, entertain, teach, etc.)
_____
_____
_____

Well-structured stories can convey both information and emotion, the explicit and the tacit, the core and the context (Snowden, 2000). Often, compelling stories help us make sense of our past and understand possible futures. Kellogg (2008) argues that writing at an advanced level not only involves the language system but also poses significant challenges to our cognitive systems for memory and thinking. Such challenges very often pertain to how knowledge for such writingisaccessed and processed. Access to such knowledge is by rapidly retrievingitfrom long-term memory or by actively maintainingitin short-term working memory while processing such knowledge and thinking is closely linked to advanced writing. Consequently, the composition of a text based narrative is widely recognized as a form of problem solving, i.e., the problem of content, what to say and the problem of rhetoric, how to say it. Training students to actively exercise accessing long term memory and using it in combination with working memory and thinking in advanced writing techniques is very often termed as 'Knowledge crafting' (Kellogg, 2008).

Kellogg (2008) states that a novice writer moves from a 'Knowledge-telling' to 'Knowledge-transforming' through cognitive apprenticeship training program over two decades. Professional writers progress further to an expert stage of 'knowledge-crafting'. However, acquiring this involves continual training over a period and most often management school students are only at the level of knowledge telling, which involves only foundational narrative capacity. Knowledge transformation as a second stage comprises in training students on techniques of working memory and the narrative that arises in this stagecanoften be enhanced by sensorial external stimuli. Though such external stimuli can be multifarious, most often visual advertisements which rely on visual cues, can be interpreted through the technique of semiotics. The goal of this unit activity is to help the students' transit to 'knowledge-transforming' from 'knowledge-telling' by enabling them to create a working memory. Ideally, by analysing the business case a working memory can be created and subsequently, drawing from this working memory, one can arrange the set of images meaningfully to compose a compelling story drawing from the concept of time-tension interaction of a narrative structure.Figure 2 showcases the narrative schema which constructs the ideal transition from knowledge telling to knowledge crafting in a business school setting. It further shows how this activity can be mapped onto the stage of knowledge transformation.

Figure 2: A schema of teaching storytelling using the concept of semiotics in business schools

Knowledge Telling

Planning limited to idea retrieval

Limited interaction of planning and translating with minimum reviewing

Writing Skill

Author

Idea retrieval with the help of the author's restricted perspectives of the world

Reader

Text

Stage 1

Knowledge-Transforming

Interaction of planning, translating and reviewing

Reviewing primarily of author's representation

Solution to the problem

Semiotic Interpretation

Partially assisted Critical Thinking

Ideation

Problem Identification

Set of Images

Arranging the images

Partially assisted Critical Thinking

Author

Reviewing the ideation

The Case as a source of Working Memory

Narrative Plot

Reader

Text

Stage 2

Knowledge Crafting

Interaction of planning, translating and reviewing

Review of both author and text representation

Problem Identification

Critical Thinking

Solution to the problem

Author's Long Term Memory

Ideation

Critical Thinking

The Case as a source of Working Memory

Author's Text

Author

Review of Author's Text

Author as Reader

Reader

Final Text

Stage 3

The Activity:

The goal of this unit based activity is for the management students to produce a story for an impactful audio-visual advertisement to position a brand. The activity consists of three stages. In the first stage, the students were introduced to the facts of the business case by allowing for a critical analysis of the case and thereby creating a working memory. Next, the students were instructed on the creative ideation exercise. Finally, the instructor administered an evaluative component that led to a narrative response, which is then used to gauge their learning of the creative ideation process.

Stage One:

In the opening stage, the students need to be made familiar with a business case that will eventually provide the impetus for the narrative. Ideally, a case relating to brand promotion

and advertisement is most suitable for this unit activity. In addition to other relevant information, the case needs to introduce the product or service on which the issues revolve. Further, it shall tactfully provide information about the demography of the existing and potential customers. Additionally, the case needs to narrate the past of the organization's branding strategy and the challenges they currently face. This information shall eventually enable the students to create a working memory that may be accessed when writing the story at the intermediate stage.

The instructor needs to share the case with the students at least a day in advance allowing them to read the case and analyze it on their own. Next, in the classroom, the instructor needs to motivate the students to investigate the case using the dialectic style of case analyses which is typically followed in business schools. Since the process of creative ideation can be unfamiliar to the students, such orientation with the familiar case method becomes essential and will ensure that the students orient themselves to the case and are well acquainted with the case facts. The written business case could be accompanied by any sensorial multi-media stimuli (video, audio, etc.) that can initiate a discussion. Pedagogical techniques such as role play, interviews, etc. can further enhance the students' understanding of the case scenario.At this stage, the process of creative ideation aspect of the case is not discussed with the students.

Stage Two:

In this intermediate stage, the students need to be elucidated on how and why the advertisers construct compelling narratives that appeal to potential consumers who might be motivated to decipher them (Mick, 1987; Scott, 1994, Phillips, 1997; Jewitt and Oyama, 2001; Snowden, 2011; Pandey, 2015). Further, the students need to be informed of what appeals to the market context being considered e.g. in Indian context, humor, warmth, happiness, social relevance,

and probably adherence to the tradition typically draw the viewers' attention (Fam and Waller, 2006).

Therefore, before the students undertake this activity, facilitators need to spend a considerable amount of time (i.e., at least four to five sessions) orienting the students how to interpret visual images drawing from the fundamental concepts of semiotics, i.e., icon, index, and symbol. Additionally, the students need to be exposed to the methods of effective short narrative, i.e., Divide the outline into three acts. Further, the students need to be briefed on the conventional techniques relevant to the plot, which is the sequence of events that make up a narrative, including the backstory, flashback, flash-forward, and foreshadowing. Additionally, they need to be oriented to the common techniques relevant to narrative perspective, or who is telling the story, include first person, second person, third person, and third-personomniscient.

Stage Three:

In the final stage, the case which was provided in stage one is now reintroduced to the students with a set of images (we recommend at least 10 to 12 images) that can be used to create a story for the advertisement. This evaluative exercise challenges students to produce compelling narratives using the creative ideation process introduced in step two. It is important that the images are selected thoughtfully by analyzing the case in such a way that the set can act as sensorial stimuli for a coherent narrative to introduce the product or service successfully. Hence it is advisable to have the image set vetted by at least a couple of advertisement professionals.

The students are also given clear instructions that additional images cannot be used and all the images in the set should be used at least once in their narrative; however, there are no limitations exercised on using an image multiple times. The emphasis is to re-arrange the images to create a narrative that has logical coherence between the scenes/events of the story.

This final activity is time bound with a maximum time limit of four hours.Ideally, by arranging the images in the case meaningfully, one should be able to compose an effective story drawing from the concept of time-tension interaction of a narrative structure. Further, the students need to be informed that their story will be evaluated on the following three criteria - image, i.e., a word or a series of words that evoke one or more of our senses (Burroway, 2011), characterization, i.e., development of convincing characters, and the plot, i.e., the events that make up a story.

The Case – A Brief Overview of Bajaj Chetak[2]

The 'Bajaj Chetak' was a popular Indian two-wheeler motor scooter. It is manufactured by Bajaj Auto Limited . The scooter was named after 'Chetak', the legendary horse of Indian warrior king Rana Pratap Singh . Originally based on the Italian motor scooter model of Vespa Sprint , Chetak was an affordable means of transportation for millions of Indian families for decades . The marketing campaign for both the brand Chetak and the company Bajaj was titled 'Hamara Bajaj' (Our Bajaj) . The company become a global player in this product category and this campaign was intended to fuel pride in the brand by increasing a sense of belonging amongst its target audience and potential customers . However, in the face of rising competition from motorcycles and cars, Chetak lost ground in India, and the production was discontinued in 2009 . The students were hypthetically asked to play the role of a manager at Bajaj Auto that was imagined to be re-entering the motor scooter segment . The case hypthetically states that the Bajaj Auto is redesigning its iconic 'Chetak' in a modern avatar to capture the lost market.

---

[2]The case has been elaborated in the appendix.

Figure 3: A set of images that were used to ignite students' imagination for a compelling narrative that can be effectively used to rebrand Bajaj Chetak.

Debriefing:

Each narrative[3] response is evaluated by the instructor and by a trained qualified Teaching Assistant independently. In addition to images, characterization, and the plot, one's ability to connect the story to the product is also judged. Each component is evaluated on a three-point scale - high, moderate, and low. It is advised to have a high inter-rater reliability between the graders. In case of disagreements, another trained Teaching Assistant or a grader can independently evaluate the stories, and a grade can be assigned based on the mean score of the three graders.

---

[3]A sample narrative is presented in the appendix.

As discussed earlier, the primary intent of this activity is to ensure that the students' progress from knowledge-telling to knowledge-transforming by connecting their narratives to the product, while still holding the interest of the reader. However, it takes at least couple of decades of training and practices to master the skills of knowledge-transforming (Kellogg, 2008). Therefore, it is recommended that the evaluation be more focused on the creative ideation process than on the finer aspects of the creative writing.

Furthermore, the facilitator should also conduct a post activity session analyzing selected narratives and critiquing the positive aspects and the areas of opportunity.

Appraisal:

As discussed earlier, the primary intent of this paper is to present an alternative form of response elicitation as a narrative. In an instance of administering this activity to the postgraduate students in Business Administration, the students' feedback was positive and reinforced the conviction that this method was effective, especially in case analyses that require learners' creativity to be stimulated. A sample of such feedback is provided below.

"Another innovative way of examining students. A great break away from the usual monotonous way of writing exams."

"It was a great experience…The exam was thought-provoking, and our minds wandered in search of creative ideas...."

This activity can also be offered to advanced undergraduate business study students. The participating students are required to have effective English language proficiency – especially in written English and knowledge of effective branding strategies. However, on borrowing this idea, communication instructors can implement this activity in other languages as well.

This unit activity can be offered to the students at both an individual level in a physical classroom environment or at a group level in an online environment. However, the facilitator should provide for sufficient time to plan for this unit.

References:

Barnes, L. B., Christensen, C. R., & Hansen, A. J. (1994). *Teaching and the case method: Text, cases, and readings*. Harvard Business Press.

Booth, C., Bowie, S., Jordan, J., &Rippin, A. (2000). The use of the case method in large and diverse undergraduate business programmes: problems and issues. *The International Journal of Management Education*, *1*(1), 62-75.

Burroway, J. (2011). *Imaginative writing: Elements of craft*. New York: Penguin.

Escalas, J. E. (1998). Advertising narratives: What are they and how do they work. *Representing consumers: Voices, views, and visions*, 267-289.

Escalas, J. E. (2004). Narrative processing: Building consumer connections to brands. *Journal of consumer psychology*, *14*(1-2), 168-180.

Fam, K. S., & Waller, D. S. (2006). Identifying likeable attributes: a qualitative study of television advertisements in Asia. *Qualitative Market Research: An International Journal*, *9*(1), 38-50.

Frensham, R.G. (1996), *Teach Yourself Screenwriting*, London: Teach Yourself Books.

Hammond, J. S. (1980). *Learning by the case method*. Boston, MA: Harvard Business School.

Jewitt, C., &Oyama, R. (2001). Visual meaning: A social semiotic approach. *Handbook of visual analysis*, 134-156.

Kellogg, R. T. (2008). Training writing skills: A cognitive developmental perspective. *Journal of writing research*, *1*(1).

Kimball, B. A. (1995). The Emergence of Case Method Teaching, 1879s-1990s: Search for Legitimate Pedagogy.

Koshal, R. K., Gupta, A. K., Goyal, A., &NavinChoudhary, V. (2008).Assessing economic literacy of Indian MBA students. *American Journal of Business*, *23*(2), 43-52.

Mick, D. G. (1987).Toward a semiotic of advertising story grammars. *Marketing and semiotics: New directions in the study of signs for sale*, 249-278.

Pandey, P. (2015). *Pandeymonium: PiyushPandey on Advertising*. Gurgaon: Penguin India

Phillips, B. J. (1997). In defense of advertising: A social perspective. *Journal of Business Ethics*, *16*(2), 109-118.

Rippin, A., Booth, C., Bowie, S., & Jordan, J. (2002). A complex case: Using the case study method to explore uncertainty and ambiguity in undergraduate business education. *Teaching in Higher Education*, *7*(4), 429-441.

Scott, L. M. (1994). Images in advertising: The need for a theory of visual rhetoric. *Journal of consumer research*, *21*(2), 252-273.

Snowden, D. J. (2000). The Art and science of Story or 'Are you sitting uncomfortably?'. *Business Information Review*, *17*(4), 215-226.

Snowden, D. (2011). Narrative.In *Encyclopedia of Knowledge Management, Second Edition* (pp. 1200-1207).IGI Global.

Appendices

The Case - An Overview of Bajaj Chetak

The 'Bajaj Chetak' was a popular Indian two-wheeler motor scooter brand manufactured by Bajaj Auto Limited. The scooter was named after '*Chetak*', the legendary horse of Indian warrior king Rana Pratap Singh. Originally based on the Italian motor scooter model of Vespa Sprint, Chetak was an affordable means of transportation for millions of Indian families for decades.The marketing campaign for both the brand Chetak and the company Bajaj was titled'*Hamara Bajaj*' (Our Bajaj). The aspiration of the company was to become a global player in this product category and this campaign was intended to fuel pride in the brand by increasing a sense of belonging amongst its target audience and potential customers. However, in the face of rising competition from motorcycles and cars, Chetak lost ground in India, and the production was discontinued in 2009. Bajaj Auto is believed to be re-entering the motor scooter segment. The report states that the Bajaj Auto is redesigning its iconic 'Chetak' in a modern avatar to capture the lost market. The pertinent question is whether it will be able to regain its lost glory?

history.

Founded in 1926 by Jamnalal Bajaj, at the height of India's independence movement, the Bajaj group has a well-known history. Kamalnayan Bajaj, took over the reins of business in 1942 followed by the present chairman Rahul Bajaj in 1965. Under the latter's leadership, the turnover of the Bajaj Auto group has gone up from INR. 72 million to INR. 120 billion and its product portfolio has expanded with the brand finding a global market.

Bajaj Auto, the flagship company of the group came into existence on 29th of November 1945 as M/s Bachraj Trading Corporation Private Limited. It started by selling imported two-wheelers and three-wheelersin India. In 1959, it obtained a license from the Government of India to manufacture two-wheelers and three-wheelers and it became a public limited company in 1960. In 1970, it rolled out its 100,000th vehicle. In 1977, it sold 100,000 vehicles within a financial year. In 1985, it started producing at Waluj near Aurangabad. In 1986, it sold 500,000 vehicles in a financial year. In 1995, it rolled out its ten millionth vehicle and produced and sold one million vehicles in a year.With the launch of motorcycles in 1986, the company has changed its image from a motor scooter manufacturer to a two-wheeler manufacturer.

Once the country's undisputable scooter czar, the Bajajs' saw the ground move away from under their feet in the late 1990s when customers shifted dramatically from buying scooters to buying motorcycles.The change had to be brought in to survive. Taking over the operational control of the company from Rahul Bajaj, his sons Rajiv Bajaj and Sanjiv Bajaj, made a major overhaul in the way the company operated.Theysought to refine their market orientation by understanding the customer needs through market research resulting in the conceptualization of the Pulsar and Discover brands which addressed the needs of the customers to have a bike with rugged styling and more power. The products were a success in the market and started eating away thecompetitors market share. It achieved a market share of 28% by 2004-05.

However, by Rajiv Bajaj's own admission, the company was in trouble in 2008 — three years after he took over as managing director and CEO of Bajaj Auto. The company had a string of failures with their brands XCD, Caliber, and Wind. It hurt even more because the company had always prided itself on being a market leader. In 2008 the situation at Bajaj Auto could be summarized in the words of Rajiv Bajaj

"*I was in a car between Bangalore and Belur in December 2008 when I received a call updating me on motorcycle sales. We were likely to end with 70,000 units for the month and this was when I asked myself where we were heading as a company.*".

the recent past.

Rahul Bajaj, President of Bajaj Auto said during an interview that he was 'hurt' by his son's decision to stop production of motor scooters. But son Rajiv opined that solutions should come more from logic than from emotions.

Rajiv Bajaj said that the motor scooter production would be stopped to pave way for augmenting growth in the motorcycle segment as part of the company's aim to become the world's biggest bike manufacturer in future.

re-launching Chetak.

By focusing entirely on the motorcycle segment and thus ignoring motor scooter altogether Bajaj has lost a big opportunity. During the slowdown, it was the motor scooter segment, especially variants from

Honda Motorcycle & Scooter India Pvt Ltd (HMSI), the unit of Japanese Honda Motor Co Ltd,which sawthe volume soaring. Even today, there is a certain waiting period (which varies by location and dealer) for Honda Activa, which is now into its third generation.

Also, motor scooters made by Hero MotoCorp (erstwhile Hero Honda), TVS Motor Co Ltd, Suzuki Motorcycle India Pvt Ltd, Mahindra Two Wheelers Ltd and Vespa are popular in the motor scooter market. The large lead time in delivery by Honda seems to have helped others, especially Suzuki, TVS Motors and Mahindra to capture a significant market share. Unfortunately, Bajaj, once the 'king of scooters', was nowhere in the picture. According to the Society of Indian Automobile Manufacturers (SIAM), in February 2015 scooter volumes jumped 18.8% to 3.70 lakh units from 3.12 units, same month last year. At the same time, motorcycle volumes declined 8.22% to 7.77 lakh units. Even the cumulative figures between April 2014 and February 2015 are in favour of scooters. During the 11 months of Fiscal Year 2015, scooter volumes grew 26.6% to 41.1 lakh units, while motorcycle sales increased marginally 3.2% to 98.84 lakh units, data from SIAM shows. Another insight from the SIAM report is that except Bajaj, all other two-wheeler makers are present across categories, be it Honda, Hero MotoCorp, TVS Motors, Suzuki or Mahindra. In short, by balancing their offerings in both scooters and motorcycles, these manufacturers are making sure to survive unexpected setbacks from each category. Since Bajaj exited from the motor scooters segment, it did not have the same benefit and had to depend solely on motorcycle sales. Therefore, the company is making a comeback with its iconic 'Chetak' in a new, modern avatar. The new Chetak is being redesigned with a four-stroke, single-cylinder and air-cooled engine, displacing somewhere in the region of 125-150cc. Additionally, it is expected to offer gearless ease, unlike old Chetak scooters.

the Chetak brand – why it matters? - nostalgia and memories

When the Chetak brand was discontinued, the country saw a kind of emotional outpouring as if a family

member is no more. Spin-doctors are calling it a generational shift linking to the change of guard in the Bajaj family but for the man on the street, it is the demise of his trusted Chetak. Many customers have a Bajaj moment to share.

Rajesh Kumar reminisces how he took his newly wedded wife all the way from Aligarh to Hissar on his Chetak with luggage…

"I had a kind of belief that it will not ditch me. After all, my father rode his Bajaj Cub till he died at the age of 75."

Medical student, Dishant Malik relates how his faith in his father's scooter multiplied the day he travelled from Mathura to Delhi to appear in a national level Medical entrance examination.

"There was a bus strike but my father was confident that the scooter will see us through. The Stepney (spare wheel) used to add to the confidence."

Adman PrahladKakkar puts things in perspective.

"The scooter was originally designed for the young but in India Bajaj and the advertising agencies hyped it as a family vehicle. It worked because women loved it for the space it offered on the pillion seat and the variety of things one can carry on ascooter. As it began to lose out to relatively sturdy and racy bikes, the company did try to reinvent it with four stroke and gearless scooters. They did manage to attract girls from the pillion to the front seat but lost the young male customer."

As for the emotional connect, R. Balki, Chairman of Lowe India, the agency which created the legendary Hamara Bajaj campaign says,

"It would have worked for any other vehicle as well. Bajaj didn't mean scooters; it meant it made vehicles which the nation drove. At that time it was scooters, now it is motorcycles."

Kakkar holds that the swagger and the connect came from the fact that it was the first 'thet' (desi) brand that gave us enhanced mobility after Hero cycles.

"Though initially, the technology came from Italian Vespa, there was no Vespa or Suzuki attached to the brand."

Over the years, the generation which believed in '*Bulandbharatkibulandtasveer*' has lost out to a fill it, shut it, forget it generation. Kakkar says the company could reinvent the brand as an antique vehicle forexport markets like Bullet and Harley Davidson.

Sudhir Kumar, technical in-charge, at a Bajaj service station, says,

"It worked for a generation when the service station culture had not set in and the vehicles were easily maintained by the neighborhood mechanic. The low maintenance cost and long life contributed to its popularity. It used to be a great option to gift to the groom."

Sudhir indicates towards the changing decisions makers in Indian families.

"Earlier it was the head of the family who used to decide what's good for the family. Today it's the youngsters, who prefer fashionable vehicles with speed. Also, technically speaking, mileage, placement of engine and wheel base tilted the balance in bikes' favour."

Rajesh Raheja, themanager of a Shiva Bajaj showroom, says,

"Though practically the scooter is not in the showrooms in the National Capital Region (i.e. Delhi and adjacent satellite cities, such as Gurgaon and Noida) for last three-four years, we still get queries about Chetak. Mostly it is from the middle-aged aged people. They get shocked when I say we no longer sell Chetak."

However, the Internet is full of sentimental messages. Neha writes,

"My dad had a Bajaj Priya for 13 years, followed by a Chetak for 16 full years before we kind of blackmailed him to switch to a Honda Activa. This news makes me so so sad! Brings in a gushing load of memories."

Shahid Khan, showcasing the 1988-model, says,

"My uncle booked it for himself. After patiently waiting for days when he got it he realised Chetak is too high for his comfort. My father bought it from him. I used to clean it for Abbu every morning and loved standing in the spacious front. Then one day he decided to teach me. I carried on the tradition when my brother started feeling the rush of hormones,"

"Its strength has been an inspirational factor. I can still exert all my weight on its chassis. You can't do it with new versions. Now we use it for carrying theload for our pharmaceuticals business. At the Ghazipur crossing, you can see meat vendors carrying loads of chicken and Pizza delivery boys rely on scooters for keeping pace with the quick delivery time their companies promise".

Bajaj Chetak does not seem to be lacking masculine appeal when it comes to showcasing it through Bollywood films. Shah Rukh Khan drove it when he played a docile government clerk, Suriji in *Rab Ne Bana De Jodi*and Ranvir Kapoor in Rocket Singh carried his crusade against corruption on a scooter gifted by his grandfather. Model Milind Soman, who loves to drive a gearless scooter, says it's a marketing gimmick to present bikes as a masculine option.

the Hamara Bajaj marketing campaign – past and present.

When the new version of 'Hamara Bajaj' was launched in 2001, the younger generation had a sort of déjà vu because they faintly remembered the music and the words. However, they quickly fell in love with the new fast paced music and feel of the film. The older generation had a nostalgic moment because they were transported back to the times when 'Hamara Bajaj' presented a mirror to their old middle class aspirations. This can be witnessed in the the Old 'Hamara Bajaj' advertisement*(https://www.youtube.com/watch?v=scltYH13uEY)*

R.Balki, chairman, and CEO of Lowe (which has worked on the iconic campaign 'Hamara Bajaj' and continues to handle the account till today) feels that Bajaj captures the spirit of India every time. He says,

"Right, in the beginning, Bajaj was the vehicle that India rides on. Old 'Hamara Bajaj' captures the mood and the aspirations of the country then."

While tracing the evolution of the campaign, he says,

"In 2001, we re-launched the same theme 'Hamara Bajaj' and this time it was a perfect combination of India being a global player and still preserving its roots. The campaign was for the Bajaj bikes."

"In 2007, 'Hamara Bajaj' for Pulsar 220 was when India was exploring biking. This campaign was about competing with oneself and once again, it captured the spirit of India." He adds, "So the first part was about patriotism. The second was to show that India was a global player and it assimilates from the west while maintaining its roots. The third part is about that the fact that 'We are good. Now let's be better than ourselves.' Thus, India's evolution has been tied up with Bajaj's evolution."

In order to address the pertinent question of whether Bajaj Chetak will be able to regain its lost glory an idea needs to be generated that will help Chetak differentiate itself from its competitors, since Rajiv

Bajaj, believes in Jack Trout's ideas in 'Differentiate or Die' that people don't actually buy products, they buy brands.

Figure 1: The Image Set

INSERT FIGURE ABOUT HERE

Sample Narrative:"Jeevan Bhar Ka Sathi - A Friend for Life"

Anooja seemed to be very disturbed that night. She woke up in the middle of the night and stared outside through her bedroom window. She was startled when Varun asked her softly "So are you excited about our first visit to your hometown after marriage?" .Anooja replied "Yes" with a husky voice. "My lovely wife's voice does not sound excited. Anu, I know something is bothering you. I have never seen you with a pretentious smile. What magic should I do to know your heart?"Anooja laughed. "What are you thinking about?" asked Varun. Anooja turns back to Varun, "Varun, Let's travel by train to my hometown trip tomorrow. During the flight journeys we have made so far, I feel like we are missing the connection to the world. I want to share all my life experiences by actually taking you through it. I know, it might be difficult for you to travel in train compromising all luxury. Also, more than that it will be difficult to convince my in-laws. But I am sure, you will feel good". "Hey dear, let us plan this next time as it is too late now. We hardly have 7 hours left to start our journey", Varun replied in a tired voice, "Let's go back to sleep".

Varun and Anooja got up early in the morning and was all set for the trip to Aruna's hometown. They took their parents' blessings. An imported Lamborghini car, gifted by Varun's father for their marriage, was waiting in the front of the courtyard for dropping them to the airport. As the car headed towards the airport road, Varun asked the driver to take a different route, which leads to the railway station. Anooja was surprised and Varun was so happy to see that surprise on his wife's face. Varun went ahead to get their train tickets. Meanwhile,Anooja waiting at the station entrance spotted a man dropping off his daughter in a "Bajaj Chetak Scooter". It meant a lot to her. Varun came back with the tickets "Anu, let's move. Anu what is there in that Bajaj scooter? Why are you staring at that? "Anooja replied, "Hey, Nothing, Varun. That father in the scooter reminds me of my father. I remember the day he got a scooter for our family. We were so excited about the scooter rides. That scooter was with us through all the happy and hard times. My father, who was identified as "Teacher Krishnan "was later identified and connected with the scooter as "Scooter Krishnan" after it came into our family. Like me and Geetha, that scooter was also treated as one of the children by my parents. OK, Varun, let's get on the train"

The couple enjoyed watching each and every station, as it passed by. As they passed by Agra, Varun expressed his desire to visit Taj Mahal on their return journey. The happy train journey ended at the "Alampur" station, a small village near Agra. At the station entrance, there stood a big banyan tree with a small teashop under it. The teashop was crowded with village folks. Looking at Anooja and Varun, the group ran to them and greeted them. Village panchayat leader was the only one left at the teashop who was looking really embarrassed. Anooja happily conversed with the group and took Varun to the Panchayat leader. Anoojasaid, "Uncle, this is my husband Varun, please offer your blessings". He blessed them and moved from there. Varun asked, "Anu, why are trying to get blessings from a person who seems to ignore us. Is he that great a man that he can't even smile at us?". "Varun, he is our panchayat president, a very good man who works hard for this village. He is a good friend of my father but was into all these superstitions and blind beliefs. Our village had a custom of arranging a marriage between a bride and a dog a week prior to the actual marriage of the girl. They have a strong

belief that this will enrich the marriage life of the couple. My father kept on opposing this custom and some of the parents were favoring my father but reluctant to make a change when their turn comes. My father couldn't accept the thought of a dog as my partner, rather he always imagined me sitting with a Prince like you. My father refused to have me married to a dog. Panchayat leader was very upset. A couple of other parents also followed my father and stopped this custom" said Anooja. "Interesting!! So my father in law is a social reformer here. Even my father used to narrate your father's interest towards social reforms when they both studied together in college. With that influence, even our marriage was arranged. Proud of my father-in-law"

Anooja and Varun headed towards the road to their home. On the way, they stopped at the school where Anooja studied. The school building was very old with lots of huge trees, an old big bell, broken furniture, and a small tiny rickshaw. The school bell rang and the school children were running out of the school. Few children were entering into a tiny rickshaw and Varun couldn't believe school children being packed inside that unsafe vehicle. "Anooja, why these children are stuffed inside this tiny vehicle?" Varun asked. Anooja replied, "Yes Varun, because of poor transport facilities, children are forced to use this kind of vehicles. Luckily, for Gita and me, our father used to drop us in his scooter. On our way to school, he used to pick up few more kids and at least3 or 4 kids will always be on our scooter." Varun smiled. He realized the role of a scooter in the village. They passed the school and saw a marriage procession with bride beautifully dressed and hiding her face in the veil and groom traveling in a horse. Behind the horse, an elephant was elegantly walking carrying valuable ornaments. Varun never thought of such extravagant marriages happening in such a small village.

As they reached home, Anooja's family ran towards the couple and greeted them warmly. Gita hugged her sister with joy. Anooja's house is a medium sized house with a large space in front of the house, which is meant for drying grains. Space is left vacant today as there will be frequent visitors coming to

the family to meet Anooja& Varun. As they entered the house, Anooja turned and her eyes seemed like she was looking for someone.

At the end of the day, Varun was walking around their house rewinding all the emotions he had passed through the day. Suddenly Varun noticed a small kid's scooter with a nameplate that spelled "Hamara Bajaj", which was the toy scooter used by Anu and Gita. Suddenly he realized that he did not spot his father-n-laws scooter anywhere in the yard. He went to Anu and asked, "Anu, I haven't met one person in your family. Where is the scooter? "Anooja smiled and replied, "We sold the scooter". Having said that, she quickly moved away from there and ran to the front yard of her house. Memories of the dashing scooter, which used to stand elegantly in their front yard, flashed through her mind.

Varun somehow understood that she is not interested in revealing something about the scooter. So he enquired with one of her relatives and came to know that his father-in-law sold that scooter to fulfill the financial shortage he had at the time of their marriage.

Next morning, the calling bell rang loudly. "Scooter Krishnan" opened the door and to his surprise, a dealer was standing in front of him to deliver a brand new Bajaj Scooter. Krishnan told that he did not order one and asked him to verify the address. But the dealer was sure that the scooter needs to be delivered to "Scooter Krishnan".

Now Varun came and looked at his confused father-in-law, who had no clue about the scooter delivery. Meanwhile, Anooja, her mother, and sister came out and were surprised to see the scooter. All of them were confused and Varun said: "Anu, Scooter came back home and so did you". Anooja understood that Varun was behind this. Her eyes were overwhelmed with tears. The whole family came to know that Varun was behind the appearance of the scooter. Varun urged his father-in-law to take their

daughters in the brand new Bajaj Chetak. Krishnan responded back saying, "We would be so happy seeing you riding this with my daughter". The whole family felt emotional. Varun stood near Chetak with a feel that he had never experienced in his life.

Tagline: Bajaj Chetak Gallops back

Research Office

Indian Institute of Management Kozhikode

IIMK Campus P. O.,

Kozhikode, Kerala, India,

PIN - 673 570

Phone: +91-495-2809237/ 238

Email: research@iimk.ac.in

Web: https://iimk.ac.in/faculty/publicationmenu.php