

Visual Metaphors: A New Language for Discovery and Dialogue

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1. Abstract:

Most organizations frame their management development efforts in formats that are rooted on verbal language. The limitations of this language, however, only allow us to scrape the surface of the organizational mind. If we want to go beyond surface knowledge and reach the deeper thoughts, feelings and meanings of organization members, we need to use the language of the mind: a language which is metaphorical, non-verbal, multi-sensorial and teeming with images. This paper describes the process we developed to tap into this hidden language during a management development effort at Baltimore Caregivers, Inc., a training and placement community-based organization founded by one of the authors. Our project was part of BCI's move toward a formal worker ownership structure, and its goal was to help BCI members articulate what they thought and felt about the organization, as well as their vision for the future. We developed an approach based on visual metaphors, discovery and dialogue. Here we discuss how we successfully developed and used this innovative approach to management development and organizational learning at BCI.

Key Words:

management development, organizational learning, visual metaphors, discovery, dialogue.

2. Introduction

Most organizations frame their management development efforts in formats that are rooted on verbal language (Aupperle, 2001; Eppler & Burkhard, 2007; Eppler, 2006; Gherardi, 2000; Stewart, 2001). The limitations of this language, however, only allow us to scrape the surface of the organizational mind (Coulson & Lewandowska-Tomaszczyk, 2005; Edelman, 2006). If we want to go beyond surface knowledge and reach the deeper thoughts, feelings and meanings of organization members, we need to use the language of the mind: a language which is metaphorical, non-verbal, multi-sensorial and teeming with images (Colston & Katz, 2005; Gentner, Holyoak & Kokinov, 2001; Gloucksberg, 2003; Kovecses, 2000; Linden, 2007; Pinker, 2000; Pinker, 2007; Thompson, 2007). This paper describes the process we developed to tap into this hidden language during a management development effort at Baltimore Caregivers, Inc., a training and placement community-based organization founded by one of the authors.

Our project was part of BCI's move toward a formal worker ownership structure. This new organizational form, inspired by the Mondragon experiment (Cheney, 1999), would involve profit-sharing and voting control of an independent board. It would also require BCI self-managed members to take a more active role in its strategy formulation process, which presented a particular change for the organization. Previous efforts to develop their managerial knowledge and strategic planning skills had largely failed,

because their traditional, verbal-centric nature tended to intimidate BCI members, who came from one of the poorest areas of the city, and had an average of 9th grade education.

In order to tap into the talent of BCI members while bypassing the limitations of managerial jargon, we developed an approach based on visual metaphors, discovery and dialogue, in order to help BCI employees articulate what they thought and felt about the organization, as well as their vision for the future. Our approach was inspired by the ideas behind ZMET, a sophisticated qualitative technique originally designed for marketing research (Catchings-Castello, 2000; Zaltman, G., 2003; Zaltman, G. & Zaltman, L. 2008).

Our goal here is to explore how we successfully developed and used a metaphor and dialogue-based approach to management development and organizational learning at BCI. We start by providing background information on BCI and the origins of our project. We then discuss the ZMET technique, its fundamental assumptions, and typical uses. Next, we describe our approach and conclude by reflecting on our experience and its potential implications for other organizations.

3. Baltimore Caregivers, Inc.

When our project started, BCI had been in business for eighteen months as a community-based health care staffing cooperative, developed under the auspices of South East Community Organization / Southeast Development, Inc. (SECO/SDI), sister community organizations located in Southeast Baltimore, Maryland. BCI drew its members from throughout Baltimore City, with a recruiting emphasis on Southeast Baltimore. Most participants were transitioning directly out of welfare, and many had been receiving public assistance for several years. While many welfare-to-work programs recruited people with GEDs or with previous experience, BCI had a lower threshold of a fifth-grade reading level and no work experience.

Upon joining BCI, participants experienced the transformative power of a twofold program: rigorous training for paraprofessional careers in health care, combined with a worker-owned cooperative business structure. Graduates of the training program received certification as Home Health Aides and Geriatric Nursing Assistants, and became members of the Baltimore Caregivers cooperative. Through BCI's subcontracting partnerships, they found placement as health caregivers in nursing homes, assisted living facilities and home care agencies in the Baltimore metropolitan area. Caregivers were expected to combine this external fieldwork with active participation in the internal management of every facet of BCI's functioning: scheduling, contract negotiation with new clients and general office administration, as well as formulation of marketing plans and personnel policies.

BCI members included 50 caregivers and four full-time staff. By developing relationships within the rapidly growing nursing home and assisted living industries, it had the potential for considerable expansion over the next several years. While BCI members had limited formal education (few were above a 9th grade reading level), they were bright, talented and committed to very intense levels of engagement with all operational aspects of the organization. What frustrated BCI's Director was that these

same talented people often became silent and embarrassed when they came together in the context of formal management meetings. The organization was poised to move into an even more fully worker-owned, self-managed model, but how could BCI members be expected to contribute to the strategic planning of this new era if they tended to freeze when requested to speak up in business meetings?

A new approach was necessary to tap into the insights and street smarts of BCI members. We needed to find a form of dialogue that did not rely primarily or exclusively on verbal language, so we developed an approach based on visual metaphors. The inspiration for our approach was the use of visual metaphors and collages in ZMET, a sophisticated technique used by major organizations for marketing research.

4. The Zaltman Metaphor Elicitation Technique (ZMET)

The Zaltman Metaphor Elicitation Technique (ZMET) is "a technique for eliciting interconnected constructs that influence thought and behavior" (U.S. Patent # 5,436,830). It is based on insights from cognitive neuroscience, neurobiology, art critique, literary criticism, visual anthropology, visual sociology, semiotics, the philosophy of mind, art therapy, and psycholinguistics (Brown, 1991; Lakoff, 1980; Linden, 2007; Zaltman, 1996; Zaltman & Zaltman, 2008). Major corporations use the technique for market research, given its power to uncover the mental models driving consumer behavior (Pink, 1998a).

The story of how ZMET was created provides a good window into some of the fundamental assumptions behind the technique. In 1990, Zaltman's interest in photography, cognitive neuroscience, and Third World anthropology led to the realization that the very act of selecting what pictures to take in a foreign culture might suffer from a cultural-based selection bias. In a trip to Nepal, he decided instead to give the villagers cameras, and ask them to take their own pictures. The only guideline was the question: "If you were to leave this village, what pictures would you take with you to show others what your life is like?" The villagers took their pictures and, in an important follow-up, the Zaltmans later sat down with them to talk about the meaning of their photographs:

Then, Zaltman explains, 'We had people talk to us through an interpreter about what these photographs meant. We think of these people as unsophisticated, but it was exciting to discover how effective they were in telling stories. In every strip of negatives, there was a story – one full of paradox, contrast, and contradiction.' For instance, most of the photos cut off people's feet. 'At first, I thought the villagers had just aimed wrong,' Zaltman says. 'But it turns out that being barefoot is a sign of poverty. Even though everyone was barefoot, people wanted to hide that – which is another important message.' (Pink, 1998a)

Zaltman decided to use a similar approach to uncover another type of mystery: what consumers actually think and feel about particular products or services. Those thoughts and feelings are often hard to verbalize, may reside below the level of consciousness, and are therefore hard to capture through traditional surveys and focus groups (Colston & Katz, 2005; Creswell, 1998; Prosser, 1996; Glucksberg, 2003; Kagan, 2006; Linden, 2007; Rolls, 2007). At first Zaltman gave participants cameras, as he had done in

Nepal, and asked them to take pictures that captured their reactions to the product or service being studied. But sometimes participants had difficulty taking pictures that could really convey their thoughts and feelings, and so the method was changed and participants were asked to select images from magazines and newspapers.

Over the years, Zaltman's technique evolved into a highly sophisticated marketing research tool, ZMET, used to identify the powerful, unconscious metaphors that influence what we think, feel and do (Zaltman, G. 2003; Zaltman, G. & Zaltman L., 2008). In a typical ZMET project, participants are asked to find images that represent what they think and feel about a product or topic. The fact that participants find those images themselves is one of the elements that differentiate ZMET from other marketing research techniques, where consumers have to select from a set of stimuli offered by the researchers. Looking for and selecting their own images triggers a process that surfaces the participants' innermost, unconscious thoughts and attitudes towards that product or topic. Participants then bring these images to an interview, where they tell stories about why they selected those particular representations and engage in a dialogue where the interviewer helps them probe the unconscious drivers for their selections. The interview concludes with a participant-directed construction of a digital collage, where the linkages and relationships between themes are further explored. After the interview, researchers conduct an in-depth analysis of the metaphors elicited through the entire process, in order to uncover what participants truly think and feel about the product or topic, whether they consciously know it or not.

In marketing research, the ZMET process tends both to confirm themes that have been previously revealed by more traditional techniques and to offer new and sometimes radically different insights into the consumer's perception of a product or a product category. ZMET discovers positive things about products and services that companies can then act on, and incorporate in their advertising or in their decisions on how to position or name a product or service. ZMET yields results that usually are difficult, if not impossible, to obtain in polls and survey research, or in isolated uses of other forms of qualitative research, such as in-depth interviews, participant observation, ethnographic research, projective techniques (Collier & Collier, 1986; Cresswell, 1998; Prosser, 1996).

For example, during the ZMET research on the Nestle Crunch chocolate bar, participants came up with pictures that related to taste, indulgence, and energy, which confirmed much of Nestle's earlier research. But one of the pervasive themes emerging from the ZMET research had to do with nostalgia, time, and history. The Nestle Crunch bar was associated with a simpler time in America, and this surprised the Nestle marketers, as it had never come up in traditional research before (Pink, 1998a). The time motif offered a rich set of conceptual and visual possibilities for Nestle to work with in future marketing efforts.

A core assumption of ZMET is that most important knowledge is not explicit, but tacit. Zaltman contends that research tools are usually limited by their emphasis on verbal language: their "verbocentric" nature is not well equipped to deal with the fact that most human beings think in images, rather than words. (Kovecses, 2005; Pinker, 2007; Weiser, 1998; Zaltman & Coulter, 1995). ZMET, in contrast, relies on visual metaphors as gateways to our innermost thoughts and feelings, providing clues to the

complex structure of the mental models that guide our behavior. As Zaltman says, "[ZMET] allows people to understand their own thinking more fully and to share this thinking with researchers. It surfaces basic constructs or ideas and the connections among them and does so in a way that is user-friendly." (1996).

Pink (1998a) compares Zaltman's techniques to the surrealist movement:

In its final form, the approach recalls the surrealist movement in literature and art, which reached its zenith in the 1920s and 1930s. Rather than conscious perception of the physical world, the surrealists sought to portray the subconscious, particularly as it was revealed in dreams. Visual art of the period often depicted melting clocks and liquid trees, incongruously positioned against hallucinatory landscapes. Zaltman has brought that sensibility to the world of market research. Goodbye, Gallup. Hello, Dali.

Although the most typical use of ZMET is still in market research, Zaltman has extended his technique to other areas. For example, one of Zaltman's research lines deals with how executives and artists approach ill-structured problems. An ill-structured problem, as defined on Zaltman's website (http://dor.hbs.edu/fi_redirect.jhtml?facInfo=res&facEId=gzaltman) is "one which is not routine, has no obvious best answer, and even the nature of the problem may be unclear. Ill-structured problems tend to be particularly significant when they arise."

In our work with BCI, we felt that this definition was entirely applicable to the type of problem we confronted in trying to identify what the organization was and, most importantly, what it could, and should be.

5. Using Visual Metaphors and Dialogue at BCI

There were several reasons why we thought that the use of visual metaphors and dialogue would be a good fit with BCI's needs. BCI was committed to cooperative management and an emerging, self-organizing, approach to developing its strategy and mission that required the participation of all BCI members, not just the top administration. On the other hand, two barriers constrained BCI's ability to draw on the collective wisdom of its members.

The first was the limited level of formal education of BCI members, which made them uncomfortable with verbal-centric managerial meetings, presentations, and formal strategy-formulation sessions. We thought that an approach based on images and visual metaphors would be a particularly effective way to bypass this barrier. Giving participants an alternative way to explore and express what they believed and felt about the organization would also serve as an opportunity for personal growth and development, which was part of BCI's social mission.

The second barrier was the geographical dispersion of BCI staff. During their training as caregivers, they formed tightly knit cohorts. But when they graduated, their caregiving work was performed individually and off-site, with limited opportunities for interaction with their peers. This was particularly ironic because it meant that graduation – the very fact that allowed them to become full-fledged members of the BCI cooperative – also limited their ability to cooperate with each other in the running of the organization. With little opportunity for informal interaction and collective experiences,

plus their dislike of formal meetings, they needed some other way to pursue corporate unity and shared meanings. We realized that adding a space for dialogue would augment the effect of the use of visual metaphors. Our concept of dialogue was based in Bohm's definition: "a river of meaning flowing around and through the participants" (Bohm, Factor and Garrett, 1991). While BCI members felt uncomfortable with formal discussion and debate, we believed that they would be more willing to engage in a dialogue about their own visual metaphors, "not concerned with deliberately trying to alter or change behavior, or to get the participants to move toward a predetermined goal." (Ibid.). We wanted to follow the spirit of true dialogue:

Dialogue moves us beyond the individual to a focus on the larger social and cultural context in which we live and work. It is a natural evolution that expands on what has too often been a singular focus on the individual to the social systems in which work is actually being performed (...). By illuminating our shared mental models, dialogue helps surface and make conscious the shared underlying assumptions and belief systems that tie us all together into larger systems. We become more conscious of and have more choices about how we approach and solve systemic dilemmas. (Ellinor and Gerard, 1998: 14)

We believed that within each BCI member there was a wealth of insight and knowledge about the organization, even if they weren't necessarily aware of those riches, or proficient at expressing them in management meetings. We also believed that if they found a better way of communicating with each other, this collective wealth would grow even further. That's why we believed that an approach that combined visual metaphors and dialogue would help BCI members become more active participants in running the organization. Visual metaphors would help them uncover their own subconscious or semi-articulated beliefs and attitudes toward BCI, and convert tacit knowledge into explicit knowledge, as demonstrated by the ZMET technique. Dialogue would help them share those emergent meanings, and build a collective vision for the organization and its work.

We had extremely limited financial resources for this project, but plenty of goodwill and faith on all the BCI represented. We launched the project with several boxes full of old National Geographic magazines donated by a local business. Money from a small grant allowed us to buy folders, scissors, poster boards, glue, and disposable cameras. It also made it possible for us to pay BCI participants a \$50 stipend upon completion of the project, to compensate them, at least partially, for the lost income from the hours that they would have to be away from work.

The project started with two introductory sessions open to all BCI members, which were held in classrooms donated by a local university, with U-shaped seating arrangements, document cameras and ceiling-mounted projection capabilities. In those introductory sessions, we talked about the goal of the project and the power of visual metaphors, as demonstrated by the origins and enormous success of a technique such as ZMET. We then asked participants a basic question, "What are your thoughts and feelings about BCI?" and asked them to go and find images that best represented their answers to that question. Participants were given disposable cameras, National Geographic magazines, scissors, and folders labeled with their names, so they could start creating their personal collections of visual metaphors about BCI: the positive, the

negative, the past, the present and the potential futures of the organization. To explain the process, we used (not surprisingly) a metaphor: "Imagine that you are attending a big family reunion. If you asked a stranger to take pictures of the reunion, he would not necessarily know who, or what was important to photograph. But a member of the family would know exactly what pictures would best illustrate what that family was all about!"

In the next round of sessions at the University, we interviewed participants and asked each of them to share their picture collections and talk about why they had selected those particular pictures to represent what they thought and felt about BCI. Participants then created their own collages, by pasting their pictures on poster boards.

Several weeks later, we invited all BCI members to come to the University for a broad dialogue and reflection on the collages. Each of those collages, in turn, was placed on the classroom document camera and projected unto a screen. We found that their authors were absolutely eager to talk about the collages and what they represented about BCI, and a vibrant dialogue ensued. Gone were the shyness and reluctance to speak that they had shown in formal BCI management meetings. Instead, they were remarkably articulate, and even poetic, when reflecting about the collages and the themes that were emerging. No one seemed intimidated or unwilling to share his or her perspectives. The language of visual metaphors created such a sense of comfort, intimacy and even playfulness that it felt as if a dam had broken, and words were flowing freely and powerfully from people who had never been heard from before when they attended traditional management meetings. As the Director observed afterwards about a previously very shy BCI member: "I didn't know that X had it in her. In our management meetings she's always so quiet, but here she was speaking like a poet!"

6. Project Learnings

We found out that in the time since the first introductory sessions, the process had already resulted in such a large number of informal conversations at BCI that changes in the organization were occurring before the project even finished. As the BCI Director observed, "We were able to think of BCI as in process, rather than static. Although we were using static pictures, the process actually felt as if we were filming a movie, rather than taking a snapshot."

The visual metaphors and dialogue used in the project revealed that BCI members had faith in the values of the organization and hope for its future. Participants chose an overwhelming numbers of images that represented BCI as an organization that was empowering them as individuals, and making a difference in their personal lives. Many of the pictures represented children and motherhood, which was not surprising given the demographics of BCI members (mostly women with children, several of them single mothers). What was somewhat surprising, given their economically disadvantaged background, was that the mother/child metaphors did not represent struggle, but success: all the pictures showed mothers providing for their children and being good role models. For example, a participant explained her selection of the picture of the backseat of a car, with two smiling children safely belted on car seats, as symbolizing

the pride she felt for now being able to care for her children and ensure their safety and happiness.

Many pictures reinforced the idea of aspiration, movement and growth, for both BCI members and the organization as a whole. Participants explained the numerous pictures of cars (including SUVs and luxury vehicles) as symbolizing that BCI was placing them on a road of financial and personal success, where they would be able not only to attend to practical needs (transportation) but also to improve their status in the community. They used pictures of cityscapes and modern office buildings, as well as plants and pregnant women, to express their confidence in the growth and future of the organization. This was particularly interesting, given that BCI's modest building was located in a barren, depressed part of town.

This focus on the future and on movement did not mean, however, that they were unaware of their present circumstances. Rather, they said that they regarded their current circumstances as temporary, just the beginning of a successful journey. This was represented by pictures of pioneer wagons, barn raisings, a turn-of-the-century team of Red Cross workers, and other pictures with a historical, pioneering feel. Even those who selected pictures of daunting, uninhabited landscapes explained their choices not as despair, but challenge. They described those pictures as meaning that BCI was a business being built in the wilderness, and requiring courage, perseverance, team spirit, strength and will power.

Participants also indicated a close identification with the care-giving mission of the organization. Most individual portfolios included images of patients and health care professionals, but some metaphors represented deeper needs being served by BCI. For example, the person who selected a picture of an old woman sitting in the dark said: "our job is to bring her out into the light."

The informal ethos of the organization was captured in the selection of several humorous metaphors. One of the pictures, originally part of a computer ad, showed dozens of monkeys at work or play in a library filled with computers (the idea being that given enough monkeys, and enough time, one could eventually end up producing Shakespearean works of literature). Sometimes what was funny was not the picture itself, but the reason given for its selection. For example, a participant chose an image of a car full of people teetering on the edge of a precipice, and explained how it represented the ups and downs of relationships in BCI: "The people you love give you strength, but you can drive each other crazy."

This playfulness extended to the issue of diversity. Whereas typical diversity efforts involve making organizations less male and less white, at BCI it was just the opposite. Most of BCI members were female and over 90% African American, and there hadn't been too many conversations about gender and race in the organization. When a participant used one her pictures, showing a racially diverse group of people, to represent her desire for more diversity at BCI (by which she meant the need for more white men), she received an enthusiastic response.

A particularly interesting finding was the choice of numerous images representing teams in some kind of uniform: not just healthcare uniforms, but also rowers on a boat, a group of nuns, and so on. BCI members did not wear uniforms when working as home

health care providers, but a number of participants were eloquent in using the pictures to highlight the symbolic meaning of uniforms. When explaining their selection of pictures, they said that uniforms projected a professional image and inspired a sense of team unity, personal pride in their appearance, and belonging to something bigger than oneself. After the conclusion of the project, this finding led BCI to embrace the importance of professionalism and institutionalize the use of items such as name badges and pins showing one's length of membership in BCI.

Another finding was that participants were generally happy with the importance and use of technology and communication tools at BCI, as represented in numerous pictures of cell phones, PDAs, computers. On the other hand, some pictures and comments suggested that participants would like more direct involvement of the Director in day-to-day activities and interactions. In response to this finding, the office was rearranged to open up access and communications.

The impact of the project went beyond changes such as uniforms, office arrangement, and new brochures and communication materials. It also reached less tangible, but not less important results, reported by the BCI Director:

More important than any concrete implementation results were the reflections and bonding that took place during the collective debriefing sessions. In this era of wordy corporate vision statements, our experience with visual metaphors turned out to be exquisitely powerful in helping develop a collective sense of vision. At BCI, we had frequently talked about our vision, made lists of values and goals, etc., but none of those more traditional efforts yielded the richness of the language and images and the deep sense of organizational direction that came out of this process. In the time between the first introductory meeting and the final debrief session many at BCI felt that our understanding of the organization had changed, and that indeed the organization itself had changed. Last but not least, the experience also had an impact on personal growth and self-image. The whole process conveyed the message that BCI trusted and believed in its members. As one of them said, 'you don't need an MBA to be heard and make a difference.' The concrete changes at BCI that resulted from the process have further reinforced the notion that everyone's ideas could have both value and impact.

7. Final Reflections

We believe that our experience with visual metaphors and dialogue at BCI can be extended to other organizations. Regardless of their size or the demographic composition of their members, other workplaces could benefit from reducing their over-reliance on jargon, numbers and conventional meetings, which often serve more to obscure meaning than to reveal it:

Thus, knowledge that can be expressed in words and numbers represents only the tip of the iceberg of the entire body of knowledge. As Polanyi puts it, 'We can know more than we can tell.' (...) Polanyi contends that human beings create knowledge by involving themselves with objects, that is, through self-involvement and commitment, or what Polanyi called "indwelling." (...) Sharing

tacit knowledge between individuals through communication is an analog process that requires a kind of 'simultaneous processing' of the complexities of issues shared by the individuals. (Nonaka & Takeuchi, 1995:60)

The more we experiment with visual metaphors and dialogue, the more we can expect to learn about the language of the mind. The more fluent we become on that language, the more able we should be to build shared meanings and learning organizations.

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