

Crafting Strategy: The Role of Embodied Metaphors

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This article presents an approach to strategizing through a process of crafting embodied metaphors - physical constructions that can be touched, moved, examined from various angles and serve as engaging occasions for sense making. In this context strategy is viewed as a crafting practice, where actors construct their perceptions of strategic issues, metaphorically as well as literally, both through and into embodied metaphors within facilitated workshops. We analyse an episode of a strategy team constructing an embodied metaphor of their ideal strategizing process, and suggest that embodied metaphors are an effective means of intervention that can help managers to debate specific strategic challenges in a generative fashion. We show how the process of constructing and interpreting of embodied metaphors can provide access to a deeper understanding of organizational, divisional or task identities, and address other important benefits of the process, such as the potential for shifts in the mindsets of strategists and the ability to engage actors not ordinarily involved in strategizing. Finally we offer some suggestions on how to foster a productive strategizing process of crafting embodied metaphors.

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Introduction¹

Developmental psychologist Jean Piaget observed that human beings begin to make sense of the world by using their hands: we initially literally ‘grasp’ the world through ‘manipulating’ objects in the physical environment around us.² While most tasks in our professional lives focus on rational, conceptual, cognitive functions, some professional disciplines still draw on this fundamental human capacity in their everyday practices. For instance, designers and architects use prototypes to externalise and probe their ideas and thoughts. Such objects can be created through a variety of media, including drawings and computer models or as tangible three-dimensional entities; they are not simply the outcomes of abstract thought processes, but can be seen as avenues for engaging in iterative sense making about the representations and ideas they embody.³

In this respect, the practice of crafting embodied metaphors in strategy is reminiscent of an ancient craft of strategizing that also drew on three-dimensional artefacts. In the 18th and 19th century so-called ‘relief’ maps were widely used by military strategists, providing a bird’s eye view of

territory that offered a novel perspective to strategists at the time. Embodied metaphors re-introduce this bird's eye view to strategy, providing strategists with the opportunity to conceptually and physically construct and inter-relate the strategic elements they deem relevant in a synthetic, integrative manner.

However, what distinguishes the process of crafting embodied metaphors from these ancient relief maps is that, instead of reading a prefabricated map, participants actively and collectively create a representation of their strategic territory. As Weick observed, having a strategic map as an artefact in itself may be at least as important to processes of strategizing as the actual degree of accuracy of the territory representation.⁴ Crafting embodied metaphors provides a prime example of a strategic practice in which strategists read (i.e. interpret) a strategic map at the same time as writing (i.e. constructing) it.

Crafting embodied metaphors is a strategic practice where strategists interpret a strategic map while constructing it.

In this article we outline a process of crafting embodied metaphors, illustrate it with an account of a management team's construction of embodied metaphors, and discuss the potential contribution of this approach as a strategizing practice. In this context, we view strategy as a practice of crafting, where actors both metaphorically and literally construct their perceptions of strategic issues through and into embodied metaphors within facilitated workshops. We propose that embodied metaphors are an effective means of intervention that can help managers debate specific strategic challenges in a generative fashion. Further, the process of construction and interpretation of these embodied metaphors can provide access to understanding organizational, divisional or task identities. We also address other important benefits of the process, such as the potential for shifts in the mindsets of strategists and the opportunity of involving actors not ordinarily involved in strategizing. Finally we offer some pointers as to how to foster a productive strategizing process of crafting embodied metaphors.

Crafting strategy through embodied metaphors

'Strategy as practice' has emerged as an approach that challenges conventional conceptions of strategy research that have primarily revolved around strategy content and to a lesser extent around strategy process. The strategy as practice approach advances an inductive perspective on strategy that seeks to understand what strategists do - the praxes, practices and practitioners of strategy.⁵

In this article, we advance the notion of strategy as a crafting practice, where strategy is both metaphorically and literally crafted through and into embodied metaphors by strategy practitioners in facilitated workshops, which we view as strategizing episodes. The term 'embodied metaphors' encompasses two interrelated ideas firstly, the emergent and iterative construction of a simultaneously physical as well as metaphorical object directly involves the body in this process; and secondly (and importantly) the resulting physical metaphors have a body - they are 'metaphors in the flesh' that can be touched, moved, examined from various angles, and serve as engaging occasions for sense making.

Exploring the source domain of Mintzberg's initial metaphor of 'strategy as craft' in more depth, Buergi, Jacobs and Roos have conceptualised the literal, physical activity of crafting strategy as a form of recursive bodily enactment.⁶ Drawing on physiological, psychological and social aspects of enactment, this perspective emphasizes the relevance and potential of manual activities for strategizing processes. At each level, crafting takes a form of recursive enactment - at the physiological level between hand and mind, at the psychological level between thought and action, and at the social level between interrelated speech acts and generation of meaning. Thus, here we conceive crafting strategy as the integrative, inductive process of constructing embodied metaphors of strategically relevant domains.

Our approach builds on and extends the tradition in organization theory that views metaphors as potent creative devices, whose creative potential increases especially where the source and target domains neither differ too much, nor are too similar. Gareth Morgan's work has been seminal in challenging dominant mechanistic and organic metaphors that guided theorizing within the functionalist paradigm, through a conscious understanding and exploration of the impact of such taken-for-granted metaphors on organizational theorizing. Morgan has gone so far as to suggest that trying to minimize or negate the influence of metaphors is not only counter-productive but also impossible, given their instrumental role in theorizing and sense making.⁷

Organisations and actors employ their sense of identity when deciding goals and direction, and as a boundary-setting guide when making strategic choices

Recent studies emphasize the strategic relevance of identity.⁸ The concepts of identity and strategy are interlinked in a pragmatic, theoretical and methodological sense. In a pragmatic sense, both organizations and their actors ideally need to have a sense of identity when deciding what the goals and direction of their organization should be, and often employ their sense of identity as a boundary-setting guide in making strategic choices as to what the organization should or should not do. From a theoretical perspective, and in particular from a social constructionist point of view, Hardy et al note that the identity of a collective (such as an organization) is seen as a discursive object that is (re-)produced in and through communicative interactions. A narrative view suggests that '*organizations' identities are constituted by the identity-relevant narratives that their participants' author about them*'. If strategies are '*the most prominent, influential, and costly stories told in organizations*' that to a large extent relate to what the organization wants to achieve or become in future, strategy can be seen as an identity-relevant narrative. Thus, identity and strategy are tightly connected through discourses that both constitute these domains, and also mediate their recursive relationship.⁹

Finally, in a methodological sense, when conceiving identity as a collectively constructed set of meanings, the construction of embodied metaphors can facilitate conversations on collective identity.¹⁰ The methodology of crafting embodied metaphors can help researchers gain knowledge of how organizational actors perceive their identity, and also enable actors to externalise their assumptions about identity through what they construct. Since, in the context of this methodology, the participants are invited to construct their view of the organizational or task identities, their constructions are in effect metaphors for first-order perceived identities that can be explored both by themselves and by researchers involved in the process. The physical objects of the crafting activity (such as sculptures, models or paintings) provide analogues that in turn allow strategists to surface, project and subsequently problematise and debate their individual and collective concepts of organizational, team or task identity.

Our embodied metaphors view of strategy is rooted in recent work in the sociology of knowledge that places our embodied nature at the core of how we perceive reality and acquire knowledge about it, and in the paradigm of embodied realism.¹¹ Table 1 portrays the interrelation between theoretical paradigms and views of metaphor and strategy. It suggests that particular views of strategy are associated with particular social science paradigms, and have a corresponding view of metaphor. In terms of ontology (i.e., of the nature of things), embodied realism holds that reality neither possesses a fixed essence independent of perception (as positivism suggests) nor wholly depends on the institutionalisation of interpretations and practices (as social constructionism suggests).¹² It holds, rather, that our bodily experience and ongoing patterns of interactions with the physical world are central to structuring our thoughts, interpretations and actions through the transfer of conceptual correspondences from embodied experience to more abstract domains.¹³

Table 1. Paradigms, views of metaphor and strategy

Paradigmatic approaches	Ontology: Nature of Reality	Epistemology: Theory of knowledge	Strategy approach	View of Metaphor
Positivist organization theory (Donaldson, 1985, 1996)	Essentialist realism; reality is rule-governed, external, fixed, independent of observers' perception and experience	Rationalism; knowledge derives from pure reason and can be expressed and analysed in terms of formal logic or other symbolic systems. A-priori knowledge is thus possible	Strategic planning. Strategy is rational and objective, determined via a structured process, and implemented through appropriate resource allocation decisions. Strategy content orientation	Metaphors are merely ornamental and expendable linguistic devices. They distort analysis of the "facts" that should be stated literally, and have no place in an objective, rational science
Social Constructivism (Berger & Luckmann, 1966; Gergen, 1999)	Ideationism; social (and for some authors even material) reality is context-dependent, shifting, based on perspective, values and interests of observer. There are no fixed essences but only ephemeral social constructions	Early philosophical empiricism; we can only know reality through our sense-perceptions or mental constructs rather than a-priori. Relativism; there are no universal laws, only contingent contexts	Interpretive approach to strategy. Shifting managerial paradigms shape strategizing processes, and to understand strategy we need to understand cognitive maps and relevant strategy practices. Strategy process orientation	Metaphors are constructive of social and organizational reality, as well as social science. They pattern ways of seeing that influence action. Views differ as to metaphors' creative potential (e.g. comparison vs domain-interaction views)
Embodied realism (Johnson, 1987; Lakoff, 1990; Lakoff & Johnson, 1999)	Experientialism; we perceive and understand the reality of external, independent elements through the way our body shapes our experiences and perceptions; social reality is shaped by the features of our bodily being	There is no unmediated perception. We know social reality via our image-schemas, themselves being metaphorical and based on the way we exist, experience and reason about the world in and through our bodies	Strategy as crafting. Strategic actors construct embodied metaphors of strategic significance through a practice of metaphorical reasoning and praxis, involving processes of recursive enactment.	Metaphors, particularly spatial and orientational ones, are fundamental to our reasoning and interpretation of the world, and are derived from our embodied existence in the world. Embodied metaphors can be a medium of strategic enactment.

In terms of epistemology (i.e., what counts as valid knowledge), embodied realism views the rationalist-empiricist dichotomy as unhelpfully simplistic, and also as refuted by the empirical evidence gathered by neuroscience. This evidence shows, for example, that babies can learn even before they are born, from their stay in the womb, and therefore that when they are born they have knowledge that is both innate (as rationalism suggests) as well as learned (as empiricism suggests).¹⁴ Embodied realism is proposed as an alternative that accepts both innate and learned aspects of conceptual systems, where our knowledge is based on our image schemas developed through our embodied experiences.

The above ontological and epistemological considerations underlie the generative potential of involving actors in crafting strategy through the processes of recursive enactment of embodied

metaphors. Through embodied realism we can therefore view metaphors as a medium of strategic enactment, within a view of strategy as crafting through practices of metaphorical reasoning and praxis.

Thus, our research question is: *what is the strategic significance and potential of an embodied metaphors approach as a practice of crafting strategy, whereby strategists construct embodied metaphors through a facilitated practice of metaphorical reasoning and praxis?*

Case study analysis

Methodology

We have pursued an interpretive case study design,¹⁵ where the empirical data set consists of embodied metaphors constructed at a management workshop carried out during 2001 with a group of strategists from a European telecom organization, which we call CellCo. By 2000, CellCo had become the fastest growing top 3 player in its domestic market with a market share of nearly 25%, and projected the image of a dynamic, innovative and unconventional company. Then two major changes significantly shifted its business landscape. Taking on a large debt, CellCo purchased a domestic 3G license through competitive bidding, and then, shortly after this purchase, was acquired by FixCo, a large, foreign European competitor that was the market leader in its own domestic market. Capitalizing on the strong brand recognition of CellCo, FixCo decided to group its entire international mobile telephony operations under a newly formed organizational entity called CellCo Global. Although CellCo had been assured of retaining a relatively high degree of autonomy within CellCo Global, its management was concerned with the implications of the change in ownership for the company's strategic direction, as well as for its operational priorities.

Our empirical case consists of a strategic episode,¹⁶ a two-day management retreat of CellCo's strategy team where, through engaging in a process of crafting embodied metaphors, five senior corporate strategists outlined an ideal strategy development process which took into account the major changes in CellCo's business landscape and ownership. The retreat was facilitated by members of the Imagination Lab Foundation, of which the second author was an associate.

We analysed video data of the physical entities constructed by this group of strategists through the crafting process of analogically mediated inquiry. This process involves participants actively in constructing or sculpting symbols which are simultaneously physical, and which are decoded or interpreted with the assistance of organization development practitioners who act as workshop leaders and facilitators. The emergence of the specific intervention technique employed here has been discussed in detail by Roos et al., whose analysis demonstrates how a change in mode and medium of the strategy process may influence strategy content.¹⁷

We operationalised the concept of embodied metaphors in terms of these constructions that are embodied in two main ways. Firstly, they are constructed through engagement of the body, involving a direct phenomenological relationship between the participants and the resulting constructions. Embodied engagement as our mode of being in the world is actualised in the making of these constructions.¹⁸ Secondly, these constructions are not simply semantic or spatial metaphors such as cognitive maps,¹⁹ but are tangible entities that extend into three-dimensional space. They are metaphors in the flesh that are recursively and simultaneously constructed and interpreted, embodying the blending of source and target domains, and engendering meaning both in their construction process and their subsequent interpretations.

Embodied metaphors engender meaning through being simultaneously constructed and interpreted

After some exercises designed to help participants familiarize themselves with the material (in this case construction toy materials), the practice of crafting embodied metaphors involves four iterative stages that operate at both the individual and collective level and build up to detailed conversations on

the core strategic issues and challenges as perceived by participants.²⁰ Firstly, participants are invited to construct and then debrief or interpret their individual constructions relating to the goal of the workshop (in this case, to discuss what an ideal strategizing process would look like). Secondly, the group is invited to integrate its individual constructions into a collective construction, where duplicated elements are eliminated, but differences and thus diversity maintained. This step in fact represents the central element of the process, since it is where consonances and dissonances in terms of the strategic issue between individual points of view are exchanged and negotiated. Thirdly, in a recurring cycle of steps one and two, individual then collective models of key stakeholders and their relationships to the core construction supplement the emerging strategic landscape. Finally, the overall construction can be debriefed and probed into by means of ‘what-if’ scenarios suggested by participants themselves.

The use of any material in such processes comes with both certain advantages as well as trade-offs. While some materials - such as plasticine - are more ‘neutral’ in terms of pre-configured meanings, others - such as construction toy materials - may be more effective in terms of connectivity and likelihood of swiftly inducing rich imagery. While the nature of materials available may constrain participants to a degree, these same materials can also enable them to externalise and debate their different views. Methodologically speaking the constraints relating to pre-configured meanings inherent in the materials can be considered limitations, but on the other hand participants are able to ascribe local meaning to their constructions through drawing from and combining these pre-configured meanings into broader metaphors and storylines, and therefore emergent, creative sense making is facilitated.

A further methodological consideration relates to the fact that the practice of embodied metaphors involves a double hermeneutic, in that facilitators/researchers interpret the participants’ own interpretations. Thus, reflexivity is important in this approach, as it is in interpretive research more broadly. The roles of facilitator and researcher (often played by the same individuals), are more prevalent at different points in time, and have distinctively different motivations in interpreting the constructions built. While the facilitator needs to read (and help participants read for themselves) the metaphors in terms of their potential for critical exploration of strategic issues, a researcher engages in a systematic, *a posteriori* analysis, which ideally should privilege participants’ own interpretations.

The practice itself is a form of process consultation whereby a practical reflexivity raises awareness of discordant voices or of the potential effects of the existing hegemony in the organization.²¹ The intervention however holds promise – at least temporarily – for a democratising effect that is inherent in the method. This individual constructions cannot be ‘read’ prior to the participant’s debriefing in plenary, which in turn creates for the individual an exclusive ownership of the interpretation; attempts to overrule the owner’s interpretation by a superior would violate the ethos of the intervention, and in our experience have rarely, if at ever, occurred.

In this particular workshop, participants had 3,000 pre-selected construction toy materials available, in a variety of colours, shapes and sizes. Following some initial exercises aimed at familiarizing them with the materials, participants were asked to construct an individual representation of how they viewed their team’s task, and then invited to integrate these initial individual models into one collective representation of the team’s task. This ‘target domain’ constituted our primary unit of analysis.

Participants constructed individual representations of how they saw their team’s task, and then integrated them into a collective representation

Analysis of strategy team’s embodied metaphors

Our analysis proceeded in two stages. Firstly, we reviewed the individual participants’ constructions with regard to their respective target domains in order to get a sense of the context-specific

metaphorical terminology employed when attributing meaning to the embodied metaphors produced. Being familiar with this emergent, situated vocabulary enabled us to iteratively sharpen our hermeneutic apparatus prior to interpreting the collective construction. Secondly, we systematically analysed both the collective construction (which we label the ‘grand metaphor’) as well as its four primary constituent metaphors. We then analysed metaphorical mappings in terms of the interactions between source domains and target domains, and the emergent meanings resulting from these interactions, drawing on participants’ perspectives and discussions. Our analysis operated at what Gibbs has referred to as the ‘interpretation’ stage of metaphorical processing, where conscious reflection about the meaning of a metaphor takes place.²² In line with our interpretive, constructionist orientation, we prioritised the participants’ first-order concepts and interpretations of the three-dimensional objects and the meanings attributed to them in the workshop.

Table 2 below outlines our analysis of the source domains, target domains and the emergent meanings resulting from the interaction between these two domains, at the grand and constituent metaphor levels.

The emergent vocabulary of the grand metaphor: individual-level metaphors

The first task of the participants was to portray the current status of the strategy process in CellCo. As an initial analytical moment, these individual constructions enabled us to better understand the subsequent metaphorical terminology of the collective construction. One strategist portrayed the existing strategizing process as the journey of a small pig eager to travel. Having overcome several obstacles, it reaches the ‘promised land’ where it learns that the short-term economic benefits, symbolized by apples, would have been much closer had it taken a different route. The participant explained, *‘we might be so hungry that we don’t appreciate the journey and go straight to eat the apples first ... We as a team do not seem to be sure whether to build a sustainable farm or whether we should go for the apples.’* Another participant portrayed current strategy-making as turning the wheel,

Table 2. Target Domains, Source Domains and Emergent Meanings in the Metaphors of the Strategy Development Team

	Emergent Meaning	Target Domain	Source Domain
Grand Metaphor	Strategy-making is a journey of confused individuals eventually reaching common ground (EMG)	Strategy development process (TG)	Journey of disoriented animals moving towards a common space (SG)
Constituent Metaphors	Organizational members are an anonymous group of individuals seeking strategic guidance (EM1)	Organization members at beginning of strategy development (T1)	Troop of disoriented animals (S1)
	Strategy making is a passionate, energetic transformation process (EM2)	Strategy-making as transforming force (T2)	Combustion engine, transforming fuel into kinesthetic energy (S2)
	Renewed, revitalized strategizing is essential to the journey (EM3)	Renewed strategy development process (T3)	Set of gearing wheels, transmitting energy between entities (S3)
	Strategic alignment provides a common framework while simultaneously allowing for degrees of freedom (EM4)	Relation of strategists and organization in renewed strategy process (T4)	Safari park as a fenced territory with degrees of freedom for different animals (S4)

where ‘a bunch of people standing in the middle of the wheel discuss strategy’. With the new company now spread around the world, he noted, ‘we don’t know any longer what the wheel consists of today’. A third participant constructed a document that represented strategy as the corporate strategic plan, as well as the process of strategic alignment. While the ‘product’ of strategy, i.e. the corporate strategy plans, were reasonably well understood, there was more confusion as to the strategic alignment process where ‘we don’t know exactly what to do. Which process allows us to unlock the potential of our folks?’ A fourth participant symbolized strategy as a house containing different kinds of animals. While cows – representing routine reporting and planning tools – were easy to lead, the motivational challenge was portrayed by a horse that ‘you can lead to water but you can’t make it drink’. The hard task of strategy making and implementation was represented by a set of cats, where ‘strategy is like herding cats’. The element providing access to the ‘house of strategy’ was represented as a key that could only be found through a difficult journey through the garden adjacent to the house. Finally, the fifth participant distinguished standard business planning and creative processes of strategy generation. The former was symbolized by a set of uniform people that ‘chunk around the wheels and go through the process. And numbers pop out in the end. And they start again’. By contrast a more diverse, creative process of strategic conversations was portrayed as a set of multicoloured, interrelated tubes that led to a small wheel – strategic thinking as an outcome of the conversation – that would have a ‘massive gearing effect’ on the organization – portrayed as a much larger wheel.

The strategy development process was portrayed as a troop of disoriented animals journeying to reach safe ground in a safari park

Grand team metaphor: ‘strategy as a journey’

The target domain of the strategy team’s construction was their ideal, renewed strategy development process (target domain of grand metaphor, hereafter TG). They portrayed their strategy development process as a troop of dispersed, disoriented animals (source domain of grand metaphor, hereafter SG) that undertook an energetic journey to reach safe and common ground in a safari park environment (see [Picture 1](#)). The emergent meaning of the grand metaphor (EMG) arising from the combination of the source and target domains was the aspiration of the team to design



Picture 1. Grand metaphor overview (Strategy-making as a journey)

a dynamic strategy development process that – in contrast to conventional strategy-making – drew otherwise disinterested and confused organizational members into passionate strategic conversation that, while operating within the parameters of a collective framework, nevertheless allowed for individual differences in outlook and identity.

Each of these dimensions of strategy development as the target domain was further cognitively structured or given meaning by four constituent metaphors identified during the analysis, which were structured as stages of the strategic journey (see Pictures 2 and 3).

Constituent metaphor one: ‘organizational members as confused animals searching for direction’

The first constituent metaphor, at the point of departure of the strategic journey, consisted of a ‘group of disoriented animals’ (source domain of constituent metaphor S1, hereafter numbered accordingly) representing the confusion of organizational members at the beginning of the strategy development process (dimension of target domain of constituent metaphor T1). By combining the source and target domains, participants conveyed the emergent meaning that organizational members were a somewhat depersonalised, confused group of individuals who were unclear about the processes and outcomes needed to succeed in strategy-making at CellCo, and thus in need of some guidance (emergent meaning - EM1).

Constituent metaphor two: ‘ideal strategy making as transformative engine’

This stage of the journey led the traveller to a ‘chocolate bar and a shaken bottle of Cola’, (S2) symbolizing a dynamic, passionate desired strategy-making process. These were next to a ‘transformative engine’ (S2) that contained at its entrance a large, monochrome block of bricks (S2) representing myopic, conventional strategic development (T2), but also the promise of an ideal strategizing process that would be passionate and energetic (T2). In terms of emergent meaning, participants symbolized their belief that conventional strategy development had been perceived as myopic and lacking passion. Physically juxtaposing monochrome with multicolour elements illustrated this duality (EM2).

Constituent metaphor three: ‘renewed strategizing as a set of wheels with massive gearing effect’

A set of people figures with extra sets of ‘eyes’ at the centre of the engine (S3) represented those strategists ‘with vision’ (T3) who could lead strategy discussion groups, arriving at a multicoloured set of bricks portraying new, creative perspectives of strategic thinking. Having gone through this engine, the strategic traveller reached an interconnected set of wheels (S3) that represented the ‘massive gearing effect’ (EM3) such a renewed strategizing process (T3) could have for the organization. A set of interconnected, interoperable wheels suggested a combination of source and target



Picture 2. Constituent metaphors 1 and 2: Troop of disoriented animals and combustion engine



Picture 3. Constituent metaphors 3 and 4: Gearing wheels and safari park

domains that revitalized and illustrated the effects of an otherwise dead metaphor - the notion of a gearing effect (EM3).

Constituent metaphor four: 'strategic alignment as fenced territory with degrees of freedom'

The endpoint of the journey was represented as a 'safari park' (S4) symbolizing the outcome of the strategizing process, namely the strategic alignment (T4) of organizational constituent functions, combined with specific degrees of freedom. The emergent meaning from the metaphorical mapping of this constituent metaphor was that the animals still differed in their shape and identity, but had now arrived in a fenced territory that provided them with different degrees of freedom, within certain parameters (EM4). Thus, the initially disoriented animals, having travelled through a revitalized strategic development process would in the end have a shared strategic framework: *'They are still different, but they are in the same park.'* Participants 'buried' a 'blue book' (S4) in the grounds of the safari park representing their corporate strategic framework (T4) seeing this as a necessary, yet less relevant and impactful outcome of the strategic journey (EM4).

The endpoint of the journey, the safari park, represented the outcome of the strategizing process as strategic alignment

Surrounding this embodied 'strategy as journey' metaphor were further related representations. A group of conventional strategic business planners was portrayed as skeletons with black hats positioned in a repetitive cycle (S) of producing pointless and ineffectual (EM) corporate strategic documents (T). Skeletons and black hats suggested bloodless uniformity that produced somewhat meaningless outcomes (EM). Other representations included a hedged cage (S) symbolizing the strategy team's (T) safe environment (EM), protected by the head of strategy (T), a warrior person figure wearing a safety helmet and a sword (S), the protector (EM); keeping the rest of the organization (T) represented by a dragon (S), at bay (organization as a threatening creature, EM). Next to the strategy process was a tall tower in the colours of the national flag (S) of FixCo (T) overlooking the entire construction; on top of this tower sat a person figure holding a laser gun (S) representing the CEO of FixCo (T), indicating the perceived tight control and monitoring of CellCo by FixCo and its CEO (EM). Underneath the platform hosting the 'transformative engine' was a large dungeon (S) containing key members of the formal hierarchy (T) such as the CEO of

CellCo, the head of strategy of CellCo as well as the head of strategy of FixCo, indicating the importance of these actors in supporting a positive transformation of the strategy making process at CellCo (EM). Finally, a spider-shaped UFO (S) populated one corner of the overall model to represent unpredictable, unforeseeable threats and dangers (EM) in the competitive environment (T).

Discussion and implications

Embodied metaphors as a mode of intervention

The strategic episode of CellCo's strategy team demonstrates how the novel crafting practice of constructing embodied metaphors allowed this team to engage in surfacing and critically reflecting on their current mode of strategizing. The use of embodied metaphors illustrates two aspects recently identified as emergent practices of strategizing, namely 'workshopping' and 'crafting symbolic artefacts'.²³ Organization development practitioners have long employed metaphor as an intervention device to facilitate a variety of organizational processes.²⁴ Such interventions have typically involved the application of metaphors selected by the organization development practitioner, based on a diagnosis of the organizational situation and on the desired organizational outcomes. While this top-down approach involves the application of a generic set of metaphors to organizational situations, an inductive approach such as that outlined in this article operates on the assumption that organizational members can themselves generate and employ metaphors in view of their context and experience, which can be tapped into for the purposes of system diagnosis and change, emphasizing the emergent, local and contextual nature of metaphors.²⁵

The embodied metaphors approach enables organizational members to construct and interpret these emergent metaphors in order to address specific targeted issues²⁶; in our case, to design a 'revitalized' strategy process, or to reflect on and develop shared understandings regarding the identity of the participants' organization or division in the context of an unsettling acquisition. In terms of facilitating shared understanding one participant noted that *'the long-term impact for me was that I had an image and understanding of the organization. I had just gone into that worldwide role and suddenly I got the knowledge that people had accumulated over three years. I got their knowledge sharing within a day'*.

Participants in such interventions typically take photographs or even fragments of the actual constructions back to their organization to display as *aide memoirs* of the issues debated, the insights gained, and the actions that should flow from them. As one participant recounted, *'the photograph of the landscape of [CellCo] stood on my desk all the time. It was a prompt of the situation we were in'*. In terms of strategizing in practice, embodied metaphors can provide a means of surfacing taken-for-granted understandings and assumptions about the organization and its environment, and can thus help participants debate what the appropriate strategic actions are and offer a new shared vocabulary for the debate. As a participant noted, *'lots of strategy meetings are about people showing off about their intelligence. Somehow through this [exercise] this was eliminated.... It took out strange terminologies, the language became real. It wasn't full of corporate buff and hype. ... So a quite grounded, down to earth approach to things that is quite helpful.'*

Embodied metaphors can surface taken-for-granted understandings and assumptions and offer a new shared vocabulary for debating strategic actions.

Constructing embodied metaphors can provide strategizing with a means to move beyond dry objectivist approaches to a more creative strategic thinking mode, and can - at least temporarily - reduce the impact of destructive politics. Comparing this approach with traditional strategy

processes, one participant suggested that *'if all people talk about issues in a normal, traditional way it leads to a false consensus and orientation of the discussion. You can't find a new twist and vocabulary if you pursue that route ... a large part of the notorious politicking and power gaming did not entirely go away but it didn't influence the conversation as in other settings'*.

Embodied metaphors as windows to organizational, divisional or task identities

Whereas organizational identity was initially conceptualised as those aspects of an organization that its members consider central, enduring, and distinctive, more recent work has advanced a more interpretive approach where organizational identity emerges as a collective, shared understanding of an organization's characteristics, and as a socially constructed set of meanings about the organization and its environment arising from inter-subjective meaning negotiations. When reviewing the state of the art, Oliver and Roos observe that the increasing interest in the concept of organizational identity engenders the need for more empirical exploration and substantiation of the concept.²⁷

In our study, the target domain - understanding the nature and context of their strategy development process - was integral to the identity of the strategy development team's key task. Collectively, the metaphors represented a rich source of empirical data for understanding actors' shared views of the identities they had literally constructed. The strategy team expressed core elements of its ideal identity in constructing the narrative of an overall journey that ended with a meaningful balance between individuality and alignment of organizational members, using a chocolate bar and a bottle of cola to symbolize the requisite dynamism and passion and multicoloured bricks to portray the need for an innovative, creative form of strategizing.

An embodied metaphor approach captures intangible and collective dimensions of organizational identity that cannot be captured as vividly or tangibly using the tools most commonly used in this field. The shared and collectively built constructions draw on a variety of source domains to represent the target domain of identity (organizational, team or, as in our study, task identity). This blending of domains produces rich, locally based meanings and narratives that offer perspectives not easily gained through standardized questionnaires, document study, or interview-based research. An embodied metaphors approach is also inductive in nature, allowing key aspects of organizational identity to emerge in a processes of analogically mediated inquiry, linked together in terms of meaningful narratives that offer a window on the group's innermost views and assumptions. Finally, an embodied metaphors approach allows for both current and aspirational aspects of identity to co-exist in the same construction (as in the strategic journey, where the beginnings symbolize the current identity and the conclusion the desired identity), in what Lakoff and Johnson have called an 'experiential gestalt'.²⁸

Benefits of the process of crafting embodied metaphors

Why should an organization engage in crafting embodied metaphors? Over time we have observed varied examples of companies employing the method to address a variety of challenges. When reviewing its strategy after having been acquired by a main competitor for example, a mobile telephony company's strategy team was able to recognize previously neglected impending competitive threats, that in turn triggered an unanticipated, yet necessary critical reflection on the company's brand positioning. A food packaging firm's senior management team were split on the strategic relevance of the company's after-sales activities. But after building representations of their company and its competitive environment, the team eventually appreciated after-sales activities as strategic, and subsequently explored alternatives to raise its capabilities in this area. And when a global software provider's newly formed European management team engaged in crafting embodied metaphors to explore the team's identity and desired forms of collaboration across national operations they were able to start defining a shared identity and to create a platform for debating differences that led to improved lateral collaboration.

As the above examples as well as research on related practices indicate,²⁹ the process of crafting and decoding embodied metaphors can deliver insights and potential shifts in managers' mind-sets that would have been difficult to attain in more conventional, numbers-driven, board-meeting style

sessions. This process also provides a context where senior teams can surface and debate contentious or critical management issues, by ‘concretising’ these issues into embodied metaphors that are imbued with meaning, and that can then be debated from a variety of perspectives. The practice of crafting embodied metaphors in strategizing draws on rich imagery and stories, rather than on dry statistics and figures, and thus helps to develop a memorable shared language the group can draw on in future strategizing. Last but not least, the process is effective at fostering team building, and enables an increased sense of involvement and ownership of the issues and of the decisions taken by participants, thus facilitating their more effective implementation.

The embodied metaphors approach to strategizing does not substitute or supplant, but rather complements, rational conventional strategy making

In addition to the novel perspectives on the strategizing process that emerged in the strategizing episode we analysed, this recursive, co-creative potential of embodied metaphors holds promise for involving organizational members other than formal strategists. Since crafting embodied metaphors involves a practice of painting a three-dimensional map with a rough brush, even ‘lay’ strategists can be invited to join the strategic conversation. Their — thus far neglected views — coming from what corporate strategists would normally consider the periphery of traditional strategy-making, can enable novel perspectives to emerge. Thus, embodied metaphors can provide a meaningful approach to including neglected, yet potentially relevant perspectives to inductive strategy making.³⁰ For example, members of other CellCo teams not ordinarily involved in strategizing processes conducted similar workshops, yielding interesting and challenging perspectives on the CellCo brand, the wisdom of the organization’s 3G investments, the management of its call centres, its lack of intra-divisional integration and the health of its mobile network infrastructure.

Crafting embodied metaphors can also surface issues of implementation and alignment at a very early stage of the process, leading to revisions in the strategy or the implementation plan, or even revealing the need to garner political support before initiatives. Thus an operations team in CellCo engaged in crafting embodied metaphors portrayed the acquiring company as a set of ‘dubious, hostile gangster’ figures, an obvious indicator of potential road-blocs vis-à-vis any strategic initiatives emanating from the new headquarters.

Fostering an effective process for crafting embodied metaphors

It is important to note that the approach does not substitute or supplant, but rather complements, rational conventional strategy making, and will certainly not be the right choice at every stage of a strategizing process. Due to its exploratory, divergent and synthetic orientation, it may prove most valuable either in the early stages of strategy development, where formal and highly structured processes can jeopardize generative strategic thinking, or in later strategy review processes, where looking at the big picture would be at least as important as detailed examination of deviations from plans.

The crafting of embodied metaphors needs to be organized and resourced adequately, while simultaneously allowing enough ‘playfulness’ to emerge within a frame that aims to explore and deliver insights on relevant strategic issues. Sufficient time must be set aside; rushed sessions lose much of their impact as functional and goal-constrained thinking tends to take over. Where the CEO or senior managers are involved, they should be mindful of the potential for any defensive or dominating behaviour on their part to lead to the construction of ‘politically correct’ structures, risking the process degenerating into a meaningless exercise. A skilled facilitator is useful in helping to bring about a healthy and productive generation, debate and integration of ideas. One pivotal aspect in the design of such processes is the choice of focus or strategic challenge for the group

to construct as an embodied metaphor. It should be broad enough to be a meaningful issue with strategic relevance, but also specific enough that it taps into participants' practical experience and can subsequently inform this experience. A skilled facilitator can ensure that the resulting embodied metaphor is a genuinely interactive and group-based product, and can also help the group debate the structures that were created and their implications for organizational action effectively, by homing in and inviting critical debate on potentially insightful aspects of the construction. Finally, it is important to capture the insights gained systematically, so they can then be translated into more conventional corporate communication formats which can act as crucial inputs to subsequent, more formal procedures of strategizing. [Exhibit 1](#) summarizes the significance and potential of an embodied metaphors approach as a practice of crafting strategy.

Exhibit 1

Strategic Significance of Practice of Crafting Embodied Metaphors

- By crafting embodied metaphors, strategy teams can surface and critically reflect on their current mode of strategizing and envision alternative modes
- This practice can capture intangible and collective dimensions of organizational identity that can not be as vividly or tangibly captured through the tools most commonly used in strategy
- Crafting and decoding embodied metaphors can deliver insights and potential shifts in managers' mind-sets that would have been difficult to gain in more conventional, numbers-driven, board-meeting style sessions
- Due to its exploratory, divergent and synthetic orientation, this approach would be most valuable either in early stages of strategy development where formal and highly structured processes can jeopardize generative strategic thinking, or in strategy review processes where looking at the big picture would be at least as important as examining detailed examination of deviations from plans

Traditionally, strategy has been thought of as an ideally rational, structured and objective process, and this has led to a mainstream view that has neglected the understanding of the interpretive and discursive aspects of strategic praxis (what practitioners do) and practices (regularities and aggregations of strategic praxes).³¹ In spite of recent constructionist and discursive developments in the understanding of strategy,³² the role of metaphor, and in particular of what we have referred to as 'embodied metaphors', has remained largely unexplored by mainstream strategy theorizing. In this article, which explores the strategic significance and generative potential of the practice of crafting embodied metaphors, we have tried to go some way towards redressing this balance.

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1. By focusing on the practical, applied aspects of the embodied metaphor approach to strategizing, this article builds on our earlier, more conceptual work in this area which has developed a theoretical basis for the process of modelling three-dimensional objects in strategizing (see Ref 6); examined the role of embodied metaphors in organization development and differentiated it from semantic and spatial metaphors

(see Ref 30); and explored embodied metaphors as a mode of reflective dialogue that can encourage mental shifts and foster strategic innovation (see Ref 30). The argument presented here is based on extensive experiences with workshops in a large number of companies. We focus on a single case that is indicative of our conceptual and practical suggestions, and of the potential uses and benefits of the process for practitioners. (Further empirical examples are discussed in the papers noted above and at Ref 26.)

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