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978-0-521-11655-8 - Crafting Strategy: Embodied Metaphors in Practice

Loizos Heracleous and Claus D. Jacobs

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CRAFTING STRATEGY

The rationalist approach to strategizing emphasizes analytical and convergent thinking. Without denying the importance of this approach, this book argues that strategists must learn to complement it with a more creative approach to strategizing that emphasizes synthetic and divergent ways of thinking. The theoretical underpinnings of this approach include embodied realism, interpretivism, practice theory, theory of play, design thinking, as well as discursive approaches such as metaphorical analysis, narrative analysis, dialogical analysis and hermeneutics. The book includes in-depth discussions of these theories and shows how they can be put into practice by presenting detailed analyses of embodied metaphors built by groups of agents with step-by-step explanations of how this process can be implemented and facilitated. The link between theory and practice is further supported by the inclusion of several vignettes that describe how this approach has been successfully employed in a number of organizations, including BASF and UNICEF.

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To everyone who took the journey of ideas with me
Loizos Heracleous

To Manuela, Lili & Oscar
Claus Jacobs

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Preparing the ground	Theoretical antecedents	Applications
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	Analyzing embodied metaphors as an interpretive, hermeneutic endeavor (chapter 3)	Sensemaking through embodied metaphors in OD (chapter 7)
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FIGURE 1 *Outline of the structure of the book.*

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Preface

Over the years, we have felt that whereas the technologies and analytical frameworks of strategic *planning* have been highly developed and refined over time, the complementary, creative, exploratory processes of strategic *thinking* remain fragmented, under-specified and under-employed by organizations. Strategic planning, through its employment of matrices, frameworks, graphs, numbers, and other complexity-reducing devices, engages a rational, objective, structured, analytical, convergent mindset and associated practices that many organizational members consider abstract and distant from their daily work. Further, strategy development in most organizations has been dominated by routinized processes of strategic planning as well as structured, functionally oriented managerial debates without an obvious or explicit component of creative strategizing.

Strategic thinking on the other hand, through its engagement of art, the body, role-playing, and reflective dialogue that seek to surface and explore systemic and holistic perspectives on management challenges, engages a creative, divergent, and synthetic mindset. In our experience this type of strategizing is often a useful way to achieve direct involvement in, and engagement with, strategizing processes as well as highlighting sensitive organizational and strategic issues that

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conventional planning may not readily be able to. Strategizing processes here are energizing, memorable, and colorful. Practices of synthetic, divergent thinking however have largely remained the domain of creativity gurus without a sound theoretical basis, and no credible linkages with organizational strategizing processes. Both conceptually and empirically, few scholars have aimed to explore the potential of doing justice to the creative act of strategizing.

We have therefore two main purposes in writing this book. First, we aim to fill the gap of a sound conceptual basis for strategic thinking through crafting embodied metaphors, drawing on such theoretical antecedents as social constructionism, metaphorical analysis, anthropological discussions of play, and the philosophy of embodied realism. We address one mode of creative strategizing practice, the playful process and intervention technology of crafting embodied metaphors. This practice usefully and productively complements typically dry, conventional strategic planning processes in order to provide a space for reflective dialogue about an organization's particular strategic challenges. Chapters 2 to 5 focus on theoretical antecedents.

Our second purpose is to provide applied illustrations and guidelines for putting these ideas into practice through in-depth analysis of actual workshops where the process of crafting strategy through embodied metaphors has been employed, and discussion of how it was employed. Chapters 6 to 9 focus on applications of this process. We address such issues as the use of embodied metaphors in organizational diagnosis, organization development, creative strategizing, as well as principles for effective play, how to design such interventions, the role of leaders and facilitators, and benefits and limitations of the process.

We also provide several vignettes of actual application of the embodied metaphors approach, to provide further examples of the types of objectives that may be pursued in a variety of contexts, of the embodied metaphors that may be constructed, and of the insights that may be gained through this approach.

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This is the first book to develop a robust theoretical basis for embodied metaphors as related to organizational processes such as organizational diagnosis, strategizing and organization development; as well as an elaborate discussion of principles guiding the application of these frameworks. Through this book we aim to extend the field from a domain dominated by rationalist, convergent and conservative thinking towards a complementary domain of strategizing as a creative, divergent, synthetic process, and help legitimize robust study of such processes. Further, despite the integration of the fields of strategy and organization already well under way, there remains a lot to be done. This book draws on both scholarly traditions of strategy and organization, and integrates them in its conceptual approach in extending the strategy field towards the study of more synthetic, exploratory processes.

The first four chapters of the book give an introduction to the crafting of strategy through embodied metaphors, and outline the main theoretical antecedents of this process. In Chapter 1, entitled “Strategizing out of the box,” we suggest that to develop and sustain competitive advantage, strategists need to have ways to help them see things anew; to move beyond rationalist, analytical and convergent thinking and to engage in creative, synthetic and divergent thinking, through processes such as the playful crafting of embodied metaphors. We discuss how this strategizing process differs from conventional strategizing by employing the key stages of design thinking as a way to juxtapose the two modes of strategizing practices. We then briefly outline the process of crafting embodied metaphors as a playful practice, a discussion we extend in the very final chapter, where we discuss ways that this strategizing process can be effectively implemented.

In Chapter 2, entitled “Metaphor and embodied realism,” we move to discuss the key theoretical antecedents of the process of crafting embodied metaphors, primarily in terms of the two domains of metaphor and embodied realism. We address metaphor as a creative force, in the context of an evolution from the cognitive/semantic dimension,

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to the spatial dimension and finally the embodied dimension. Given that crafting strategy through embodied metaphors has in practice taken place in the context of organization development interventions, we then discuss the theoretical development of metaphor in this context. We finally address the paradigm of embodied realism in relation to social constructionism, in order to more clearly position embodied realism in prevailing literature and to highlight its potential contributions.

In Chapter 3, entitled “Analyzing embodied metaphors as an interpretive, hermeneutic endeavor,” we continue discussing the theoretical antecedents of our approach, by outlining some basic conceptual orientations and analytical directions suggested by interpretive theory and hermeneutics which have informed how we conceptualize and analyze embodied metaphors in our work. These orientations include the concern with *verstehen*, the inseparability of action and structure, and the multiplicity, contextuality and historicity of meaning. We address and expand on these and other considerations and how they relate to the interpretation of embodied metaphors.

These theoretical antecedents form the backdrop for subsequent discussion in Chapter 4, entitled “Crafting strategy as a practice of embodied recursive enactment.” By exploring Henry Mintzberg’s famous “crafting strategy” metaphor literally, we highlight here the relevance of the hand–mind connection for epistemic developments and achievements. Situating the discussion within the practice turn in strategy, we discuss how integrating three foundational perspectives, namely physiological, psychological and social constructionist ones, lead us to conceptualize crafting strategy as embodied recursive enactment.

In Chapter 5, entitled “Play, analogical reasoning and dialogue in the crafting of strategy,” we build on earlier discussions and contextualize the concept of crafting strategy further by exploring three social practices that are crucial to crafting strategy as embodied recursive enactment. We first explore the concept of play as a human

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capacity that in our context consists mainly in a relaxation of rational intentionality and the manipulation of objects in order to discover new insights. Secondly, and in terms of the cognitive/psychological dimension, we explore the human capacity of analogical reasoning, in our case through physical analogs. Thirdly, and in terms of the communicative dimension, we discuss the concept of dialogue as a specific communicative mode that allows for reflective as well as generative meaning negotiation. We illustrate each of these practices with brief applied examples. We then move to the latter part of the book (Chapters 6 to 9), which addresses applications of the concept of crafting strategy through embodied metaphors.

In Chapter 6, entitled “Understanding organizations through embodied metaphors,” we operationalize the embodied metaphor approach in a study of three organization development workshops where groups of actors were engaged in constructing embodied metaphors, physical entities whose target domains were a participant’s task, their organization in its business landscape, and the identity of their division. Participants drew on a variety of source domains, and the resulting metaphors produced insights for them in terms of developing shared views of their target domains, as well as for us as researchers through a three-stage analytical process involving contextual understanding, within-case analysis and cross-case analysis. We show in this chapter that analysis of embodied metaphors can afford access to actors’ first-order conceptions of organizational dimensions, can reveal alternative qualities and interrelations among them, and in so doing poses substantial challenges to established conceptions of ontology and method in organization theory.

In Chapter 7, entitled “Sensemaking through embodied metaphors in organization development,” we suggest that an embodied metaphor approach complements and extends traditional deductively oriented approaches to employing metaphor in organization development by emphasizing induced rather than naturally occurring metaphors, building on a developed base of diagnostic

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technologies, enabling a collaborative effort of metaphorical selection and diagnosis, and enabling the employment of embodied metaphors to address specific, targeted issues of consequence to participants. We illustrate these elements by discussing the case of a management retreat of a Swiss bank.

In Chapter 8, entitled “Strategy as a crafting practice,” we view strategy as a practice of crafting, where actors both metaphorically as well as literally construct their perceptions of strategic issues through and into embodied metaphors within facilitated workshops. We illustrate this view by analyzing an episode of a strategy team constructing an embodied metaphor of their ideal strategizing process. In this context we suggest that the process of constructing and interpreting embodied metaphors is an effective means of intervention that can help managers debate specific strategic challenges in a generative fashion; and can also enable deeper understanding of organizational, divisional or task identities. We then 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, and conclude by offering some suggestions on how to foster a productive process of crafting embodied metaphors.

We end the book with Chapter 9, entitled “The process of strategizing through crafting embodied metaphors,” which is to a large extent a chapter concerned with application, and particularly how actors such as managers or organization development practitioners can implement these ideas in organizations. Here we summarize the benefits of the process of strategizing through embodied metaphors, and outline a detailed roadmap for how to implement it effectively. In this context, we also discuss in what situations it is more appropriate to use this process, and finally outline some enabling contextual conditions that enhance its employment.

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Loizos Heracleous

For nearly three years, I worked as a research fellow in strategy and organization at Imagination Lab Foundation in Lausanne, Switzerland. An IMD spin-off in spirit and founding staff, the non-profit foundation was endowed with a generous sponsorship by a large construction toy manufacturer from Denmark and aimed at exploring unconventional materials, modalities and approaches for strategy work. At the time,

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the team experimented a good bit with the Lego Serious Play technique and adjacent approaches and materials. In turn, these learning experiences prepared the ground for shaping and contouring the embodied metaphor approach as an adjacent, yet distinct perspective presented in this book. I very much appreciated the transdisciplinary collaboration with my then colleagues Peter Buergi, Mark Marotto, David Oliver, Richard Randell, Matt Statler and Johan Roos, the foundation's entrepreneurial director. I gratefully acknowledge their conceptual contributions – often leading to co-authored work – as well as their empirical contributions in terms of excellent workshop facilitation and related data gathering.

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Claus Jacobs