

Mind your metaphors: early warning signals when rolling out strategy

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How people use metaphors often reveals a lot about their way of thinking, about how they see the world, including which behaviors they find the most appropriate for the workplace. This study presents an approach on how to benefit from metaphor analysis for a smoother strategy implementation.

We use metaphors to describe our experiences and to understand our world (Morgan, 1983). Kendall and Kendall (1993) show how the set of metaphors used by IT system analysts present opportunities for action but also constrain them from seeing and enacting alternative possibilities. An awareness of the metaphors organizational members use, therefore helps us understand life within organizations (Forster *et al.*, 1999). For example, Marshak (1993) shows that a common metaphor provides a shared understanding within an organization, while differing metaphorical reasoning may be preventing people from really understanding one another. When the underlying metaphors used by organizational members differ, conflict over what to do and how to do it may occur.

As metaphors often reveal “underlying, usually unarticulated, understandings about a situation” (Marshak, 1993), a conscious examination of metaphors and their meaning allows us to make tacit assumptions and perceptions explicit (Oswick and Montgomery, 1999).

In our case study, we describe how the implementation of a major knowledge management initiative was depicted by two distinct sets of metaphors used by different organizational groups. The different metaphors implied two very different approaches to the implementation of this major project. The first approach, describing a standardized implementation approach, was broadly reflected in religious metaphors. The second approach, describing a focus on specific small target groups, featured war and illness metaphors. We demonstrate how examining the implicit imagery used by different organizational actors can serve as early warning signals to anticipate problematic developments in the strategy rollout phase.

Case company and context

Telcotech is an international player in the information and communication network business employing about 7,000 persons worldwide. It provides corporate and carrier network clients with solutions for data and telecommunication applications. To be sensitive to customer demands in distinct market segments, the sales division granted its regional sales units a high degree of autonomy. Due to a shift in competitive pressures, the expectations of customers were becoming more and more sophisticated while product cycles were decreasing. Value creation in sales was increasingly associated with developing and deploying knowledge-intensive solutions that were highly tailored to customer needs. This industry transformation from being a “box mover” that sold pre-specified telecommunication

systems toward being a “solution provider” that focused on individualized knowledge-intensive solutions required Telcotech to rethink its strategy and develop the service capabilities to compete in the new environment.

To succeed in the new environment, Telcotech had to come up with timely solutions to customers’ complex problems, relying on its spectrum of knowledge and experience. This meant that it would have to encourage its regional sales divisions to share their knowledge with one another. The expected benefits included a reduced time to market, improved quality by avoiding past mistakes and better customer service.

The top management at Telcotech decided to set up a task force called the KM (knowledge management) team to foster knowledge sharing between the regional sales divisions. The aim of the team was to develop and implement an IT-based tool for knowledge sharing. The team designed a portfolio of three intranet-based initiatives that differed in approach and platform but were communicated under the same Knowledge Management roof:

- “KM Yellow Pages” were designed to identify people with an expertise in a specific field and resulted in a directory of expert employees.
- “KM Service Knowledge” aimed to provide individualized customer solutions, including tips and tricks for service employees and a virtual discussion forum.
- “KM Competitive Intelligence” focused on leveraging and re-deploying knowledge regarding product and service solutions with specific features and information on competitor offerings.

Methods

To elicit the experiences and perceptions from various Telcotech employees involved in the project, narrative interviews were conducted over the lifecycle of the KM implementation phase, spanning a two-year time period.

A total of 62 interviews were conducted with 28 Telcotech employees. Interviews included stories from a variety of organizational actors to ensure that different, possibly conflicting, interpretations and points of view (Rhodes, 1997) were represented. Interviewees were selected from a broad range of functions within Telcotech, including individuals with high and low organizational status, employees at the center and at the periphery of the Telcotech organization. Nine of the 28 interviewees were members of the KM project team, while 19 were either Telcotech top managers assuming the role of project mentors (six persons) or Telcotech employees working in sales regions (thirteen persons). 21 of the 28 interviewees were interviewed at least twice.

The overall interview structure covered the process, content and context of the Telcotech KM project. Interviews contained open-ended questions, allowing interviewees to recall, order and evaluate their experiences (Durgahee, 1996). Each interviewee was asked to tell the story of this project. Questions focused on the project in general (What happened? Why did this happen?), the interviewee’s role in the project, any difficulties faced and the

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learnings and potential conclusions from the project. The open-ended questions allowed metaphors to appear naturally, while people spoke about their project experiences.

The study then adopted a stepwise process to identify themes evolving around metaphors (Glaser and Strauss, 1967). We sorted and ordered the interview raw data around the recurring metaphors employees used to make sense of their project experiences. The data analysis started with a phase of initial identification of the metaphors used by the interviewees. Looking at the context in which the metaphors were used, we then analyzed how the metaphors related to project developments, resulting in categories for grouping the data. In the following phase relationships among metaphors and categories were discerned, leading to the identification of themes (Strauss and Corbin, 1990).

The following sections analyze the metaphors that surfaced in the interview narratives. Different groups of metaphors reveal certain key assumptions about organizational functioning. Particular emphasis is placed on the implicit meanings conveyed by the metaphors and how they relate to the development of the project. The analysis further considers whether the different theme categories reveal contradictions, tensions and dilemmas inherent in the project.

Findings: conflicting approaches to strategy implementation

Two different approaches to the implementation of the initiative surfaced in the interview analysis. Each approach was described by a distinct set of metaphors. The first approach, describing a standardized implementation approach, was broadly described by religious metaphors. The second approach, with a focus on specific small target groups, featured war and illness metaphors.

The standardized approach

The standardized approach described the implementation of the KM initiative as a wide communication of the same idea throughout the whole Telcotech organization. This approach did not differentiate between groups of users within the organization. The comparison between the implementation of the initiative and the spreading of a religion dominated Telcotech management’s discourse. “Knowledge management means the evangelization of all employees, changing the mindset of the lethargic masses, and not cherry picking the individual groups”. Expressions such as “spreading the KM message” characterized the management discourse.

Following the religious metaphors, the initiative was equated with the gospel. It implied that everybody had to be familiar with the same message, hence a standardized implementation approach. The role the KM implementation team was supposed to assume in such a standardized approach was that of “preachers” and “knowledge evangelists” preaching the importance of knowledge sharing throughout the organization and evoking the benefits and promises of the “KM gospel”. Slogans such as “my knowledge pays for Telcotech” and other “evangelical appeals” were part of this approach to make employees realize that “any career advantages of hoarding knowledge were obliterated in the knowledge economy”. The missionary character of the initiative suggested by the religious metaphors furthermore implied a certain superiority of the team who, in contrast to the rest of the organization,

understood and knew the project's message and needed to "convert" the rest of the organization that was ignoring "the gospel" so far. For the users, the use of religious metaphors to depict the initiative suggested that KM had a mystic connotation, implying that this "God-given" word was not to be questioned and went beyond mere rational reasoning.

The implications of the religious metaphors used for the implementation were far-reaching: By implicitly depicting the content of the initiative as something beyond discussion and critique, the KM team was portrayed as the ultimate authority on the subject. Due to the dogmatic character of the initiative, the team enjoyed implicit protection against criticism. At the same time, this very same situation meant that the initiative found little support among those who would have to actually utilize it. A behavior in line with the religious metaphors precluded a collaborative effort with the field, e.g. in the form of discussion and input from other parts of the organization in conceptualizing the initiative. By adopting a behavior in accordance with the role of knowledge preachers, the team contributed to the perceived lack of fit with the needs of the field. In retrospect, team members referred to the religious conviction and missionary character of the initiative in the interviews: "We wanted to convert everybody to knowledge management. The credo was everybody needs KM. However, there seemed to be fundamentally different needs and expectations within individual organizational groups as to what exactly knowledge management would be needed for. The question of relevance for each group remained unaddressed by such appeals". The lack of differentiation in the communication led to minimal recognition as to the extent to which KM was also a "good message" for the individual employee. As a result, the team later faced a lack of motivation of potential users of the tools in the field.

Looking at the evolution of the project, we note significant changes in the use of the religious metaphors over time. While the religious metaphors featuring the implementation approach were coined by Telcotech top management and picked up by the team at the beginning of the initiative, the team members changed their perspective about the implementation. As they moved from a standardized approach to a customized implementation approach, a different set of metaphors came into use by the team. However, while the KM team altered its perception of the appropriate implementation approach, Telcotech management's outlook on the initiative did not change. Management continued to speak about the initial vision of the implementation as an "evangelization approach" and did not adopt any new metaphors. The increasing divergence in the use of metaphors reflected the communication problems between management and the team that surfaced at a later stage of the project. The problem was aggravated by the team's shift in the implementation approach without any discussion which did not include any discussion between the KM team and management. A careful examination of the distinct sets of metaphors would have revealed the growing divergence at an earlier time and contributed to a better understanding of the differences in the implementation approach.

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The customization approach

Two themes describe how the team’s language shifted to the use of a different set of metaphors during the implementation. The first was an illness theme describing the KM implementation as a “virus infection”, while the second was a war theme comparing the implementation of the initiative to a “guerrilla warfare tactic”. The following paragraphs describe each theme and then discuss their implications for Telcotech and the project.

The “virus infection” theme likens the initiative to an illness that spreads continuously throughout the organization. As the team leader suggested, the “KM virus should focus on small teams and their specific needs”, referred to as “hubs of the total knowledge management strategy”. The hub metaphor suggests that the specific needs of these small teams were the means of connecting them to the initiative. To “infect a team with the KM virus”, meaning to motivate and inspire organizational members to use and appreciate the initiative, they needed to be confronted with the concrete benefits of KM for their particular circumstances. Once the benefits for a target group had been realized, the infected teams themselves were to subsequently “infect other organizational members with the virus”. Taking advantage of existing networks of collaboration, the virus was supposed to spread across teams until the whole organization was to finally link all 7,000 sales employees in the knowledge sharing initiative.

In contrast to the standardized approach, the “virus infection” approach implied a stepwise implementation. This process was more self-organizing because it took advantage of the promotion through others. The stepwise implementation process was slower in the beginning due to the time lag resulting from the delay until concrete results were generated with the first user groups. The process was then supposed to gain momentum and accelerate as a result of the growth of the “virus cells” throughout the organization.

Following this image, the KM team assumed the role of infectors who passed the illness on to the rest of the organization. By infecting the first teams with the virus, i.e. by motivating a specific target group to apply KM, the team acted as an initiator but left the responsibility of spreading the initiative to other members of the organization. By attacking one specific target group in the organization, and trying to make this group susceptible to the KM illness, the team’s role was far more focused in comparison to that of the “knowledge preachers” of the standardized approach.

The negative connotation usually attributed to the use of an illness metaphor was reversed, presenting the spreading of an illness as something good for the organization. The use of the positive vision of the illness suggests at the same time that the team is superior. Passing on the virus was based on the team’s conviction that it would result in a positive outcome for the organization. The organization had to be infected for its own good. As a result of the infection, organizational members were to change established patterns of behavior with regard to knowledge sharing and exchange.

The other group of metaphors used for the focused implementation approach was one of guerrilla warfare. In contrast to the peaceful, non-violent preaching approach of the standardized implementation strategy, guerrilla warfare represents a violent underground activity which needs small groups of fighters, in this case the KM team members, to succeed. Waging guerrilla warfare, comparable to enacting the initiative, had a connotation

of being a dangerous enterprise for the participants. The mission to change organizational attitudes and behavior toward knowledge was depicted as unpredictable and risky.

The warfare image depicted the rest of the organization as hostile: they were potent adversaries who had to be defeated by guerrilla tactics. The description indicated the minority position of the team within Telcotech. It presented the team as a small troop of fighters who could not count on much help from other parts of the organization.

The war imagery suggested that, to fulfil the mission, a high degree of violence against members of the organization was inevitable. The implementation work of the team was compared to attacks on the Telcotech organization to defeat hindering forces. At the same time, the use of the guerrilla warfare metaphor assumed a function of justification and legitimization. Portraying themselves as a small group of brave fighters facing a hostile majority that did not share their ideas, the team used metaphors insinuating that any means to realise their goals was permissible.

The evolution of metaphors from evangelizing to the virus infection and guerrilla warfare metaphors reflects the team's changed awareness of how to implement the initiative successfully. It also implies a shift from "soft" to "hard" measures and having to offer tangible and concrete benefits to motivate Telcotech employees to participate in the KM initiative. The preaching approach that focused on persuading the Telcotech members to participate through an appeal to their empathy and understanding was therefore replaced by violent measures of infection and war-like attacks. However, in spite of the use of violent figurative language, the team did not possess tangible measures of force that could have obliged the Telcotech employees to participate in the initiative.

Figure 1 summarizes the two main themes used to describe the implementation approach and attributes the metaphors to the organizational groups using them.

Conclusion

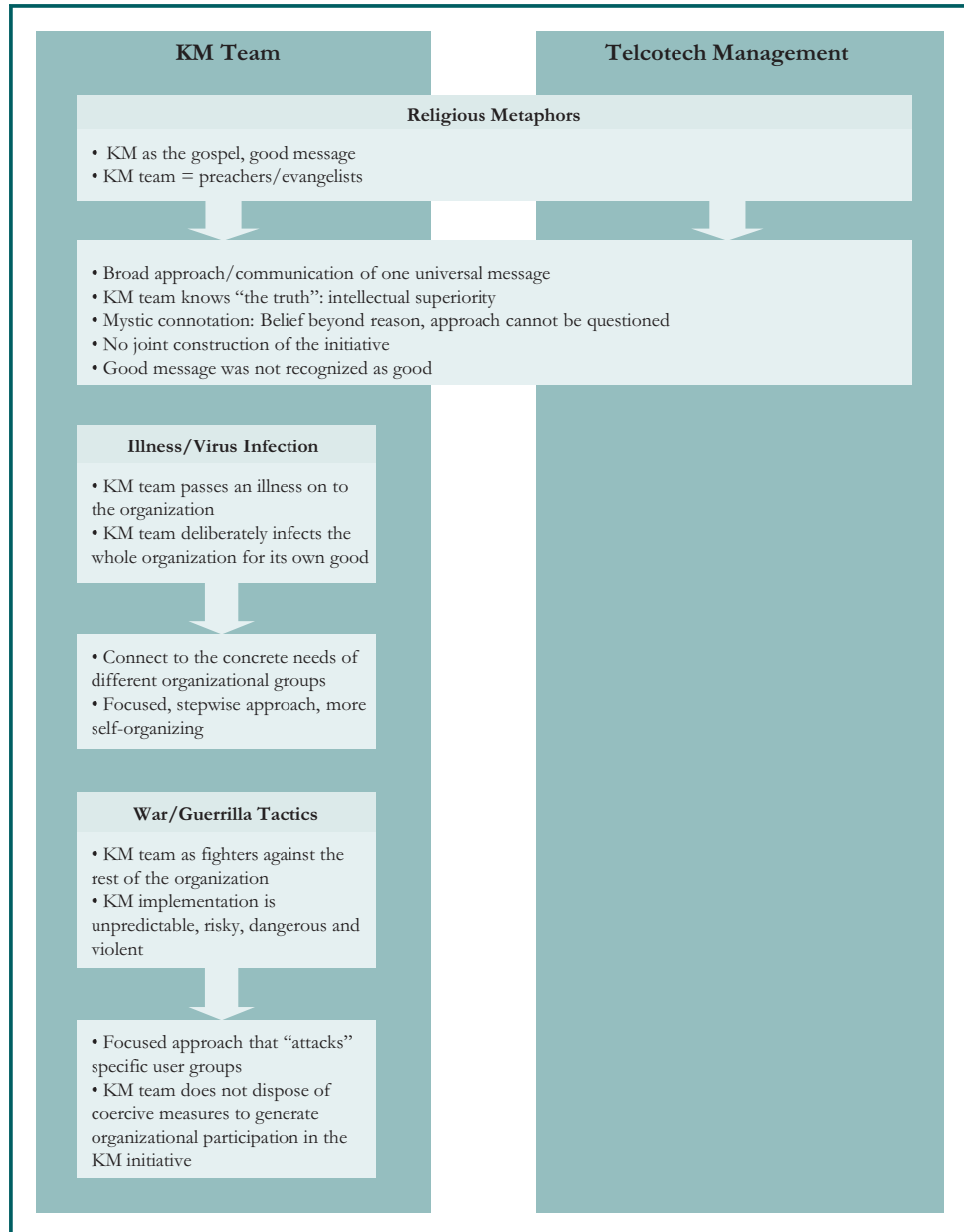
The two sets of metaphors used in the KM initiative describe two distinctive approaches. The virus infection and the guerrilla warfare metaphors both depict a stepwise, concentrated, bottom-up approach focused on specific groups, while the religious metaphors imply a broad, top-down approach that aims to simultaneously convert different groups of the organization with an identical message.

Our findings highlight how particular sets of metaphors may be detrimental to effective strategy implementation. Additionally, we show how the adoption of specific metaphors such as the evangelization theme may reinforce behaviors that make a change of the strategy implementation approach particularly difficult.

The metaphors not only reflect these different approaches. The different sets of metaphors draw attention to the parallel existence of two incompatible implementation approaches used by two different organizational groups, namely, Telcotech management and the KM team. The difference in metaphorical systems and vocabulary indicates that the two groups do not share

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Figure 1 Metaphors used during implementation



the same frame of reference. They foreshadow the difficulties in communication between these two groups that later unfolded during the project progression. Their different visions of the implementation approach were further manifested in the differences in the marketing and communication of the initiative throughout the organization.

Metaphor analysis further helped to highlight any gaps between the intended strategy implementation approach and the means that organizational actors may have at their disposal. In spite of the use of violent figurative language such as warfare, the KM team did not dispose of any tangible measures of force that could have obliged the Telcotech employees to participate in the initiative.

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A close examination of the metaphors used reveals implicit emotional states that project reports or formal documentation tend to filter out. The change of metaphors from a non-aggressive approach to an approach that indicates a rather high degree of violence combined with a hostile connotation attributed to the rest of the organization indicates an increasing degree of isolation and frustration felt by the main change agents during this stage of the project.

Through early sensitization to any divergence of metaphors used by different organizational groups, as well as observing inconsistencies between metaphors used and exposed behavior, strategy implementation may be managed in a more effective way. Metaphor analysis therefore represents an effective way to anticipate problematic project developments and difficult collaborations during the strategy rollout phase. It captures implicit meanings and connotations that business languages tend to ignore, yet that play a powerful role for enabling or obstructing effective strategy implementation.

Keywords:
Strategy implementation,
Metaphor analysis,
Tacit knowledge,
Change management,
Narrative,
Knowledge management

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