

# An Appreciation of Metaphors in Management Consulting from the Conceptual Lens of Holistic Flexibility

Rajneesh Chowdhury 

Management Consultant, New Delhi,  
India

## Correspondence

Rajneesh Chowdhury, New Delhi India.  
Email: rajneeshchowdhury@gmail.com

## Abstract

Metaphors are popular in human interaction as a means to make relevant associations, convey complex ideas, and even dramatize reality or introduce humour in conversations. Metaphors, if leveraged effectively, can be a powerful tool for management consultants in their client engagement process. Chosen with a sensitive and empathetic rationale, metaphors can not only help fathom highly complex problem situations, they can also bring in an element of light-heartedness in consulting conversations that may otherwise be stale and unexciting. Metaphorical associations can enable informality, trust, and long-term engagement between consultants and their clients. This paper presents a first person narrative of how the author has used metaphors as a tool for creative consulting. A reflection is provided on how the experiences narrated in this paper align with the conceptual lens of holistic flexibility introduced by Rajneesh Chowdhury in his latest book on systems thinking for management consultants in 2019. .

## KEYWORDS

flexibility, holistic flexibility, management consulting, metaphor, systems thinking

## 1 | INTRODUCTION

As a management consultant, I have used a range of approaches and tools in different situations depending on the nature of the client and the complexity of the problem. These approaches have involved a mix of logical inferences, interpretive dialogue, and critical engagement, directed as per the appropriateness of the context. Recently, I spent some time reflecting on how in the recent 5 years, I have used some creative and unconventional tools for client conversations that have led to enriched engagements and trustful relationships. I specifically reflected on how I have used metaphors in the client discourse.

I identify myself as a “critical systems thinking” practitioner due to my interest in the discipline and my

ardent experimentations with systems approaches as a management consultant and researcher.

Lately, I reflected on the great amount of creativity, seriousness, and power that metaphors have brought into my client-engagement process. As light-hearted and humorous they can be, I realize that metaphors can strongly equip a consultant to critique one's own boundaries, facilitate inclusive dialogue, and enable a break from usual consulting formality. This can also help in creating more flexibility and meaning in the client–consultant relationship.

I will begin by first defining management consulting and the contours associated with the profession. I will then introduce metaphors and their use in management and organizational studies. I will discuss the conceptual lens of holistic flexibility in the perspective of critical

systems thinking and how metaphors can align with this schema. This will be followed by a discussion on four first-hand case narratives of the use of metaphors in my past consulting projects and the benefits this brought in. This will lead to a deliberation on metaphors as a tool for creative consulting. I will talk about how my experience aligns with the key pillars of holistic flexibility. Finally, I will reflect on some potential shortcomings of my use of metaphors and the learnings one can derive for the management consultancy industry.

## 2 | MANAGEMENT CONSULTING

Management consultants act as external advisors to corporations, nonprofits, governments, and any other forms of organizations (who are known as “clients”) to help them with insights and best practices in order to benefit specific objectives or to resolve known or even unknown problems. Consultants operate in an intense environment that regularly entails new challenges. Learning curve is steep and consultants’ exposure is normally with the seniormost levels in the client organization. There can be immense excitement and novelty due to the very nature of the profession.

As management consultants operate at a very high end of the knowledge spectrum, it is a general expectation for them to come in with specialized expertise for problem solving in situations that may be often alien and with clients that may be completely unknown. Clients expect consultants to offer an independent expert view of an organization or a situation, and they are expected to address some of the most pressing problems organizations face (Chowdhury, 2019). Such expectations can be challenging and intimidating, and consultants may find themselves in situations where they have to familiarize themselves with an alien environment with great speed and offer solutions that the organization’s “insiders” would not have been able to visualize (Chowdhury, 2019). At the same time, the consultant needs to work under limitations posed by their client in terms of time, resources, and expectation of results. Consultants also have internal pressures from their employers ranging from optimized resource utilization, usage of proprietary knowledge, and proximity that they can develop with the client. Nosseir (2016) talks about the consultancy business as “a double-edged sword, often involving consultants in a conflict between serving their clients to the utmost of their knowledge and manipulating this knowledge to serve their own business interests”. Such challenges were also identified by Kipping and Armbruester (2002) who talk about stress created due to “otherness” of the consultant from their client. This otherness brings in

a great degree of formality between the client–consultant relationship manifested in language, self-presentation, and modes of communication. Right from formal greetings, codes of conduct, and preference for logical and factual communication, consultants are often expected to *come across in a certain way* that further adds on to the otherness and stress associated with the profession.

I have briefly referred to both angles of the consulting profession—one that is enriching and rewarding and the other that is stressful and intimidating. The mode of interaction between the client and the consultant plays a significant role in shaping this experience. There is indeed a power dynamic that operates between both sides that influences the same. Whereas at one level, the position of knowledge and expertise of the consultant may make them seem more powerful and therefore always right, at another level, the client being the final customer, the pressure of client delight may push the consultant to align with what a client says or demands without displaying much criticality.

## 3 | METAPHORS

The word “metaphor” is derived from two Greek words: “phor” meaning “to carry or bear” and “meta” meaning “across” (von Ghyczy, 2003). A metaphor is a figurative expression of something in terms of something else that is anything but what is described. We use metaphors regularly in our everyday parlance.

Gibbs (1992) defines metaphors in terms of two conceptual domains—source and target. Source is the domain where the reference is generated, and target is the domain where the domain is applied for the sake of representation. The literal association between the generation and application domains can be entirely unrelated, but the representational association between the two can carry significant figurative relevance and meaning. Metaphors can be influenced by several factors that influence their representation, association, and interpretation.

Study of metaphors is an exhaustive subject that has evolved over decades. However, for the purpose of the case narratives presented in this paper, I will refer to Torgny’s (1997) work on transfer of meaning in the context of metaphors. This transfer of meaning can happen based on two theories: substitution and interaction.

Substitution refers to a direct transfer of a concept from one domain to another and operates with the logic of analogy creation. This theory has a comparison view where the “target” reflects the characteristics of the “source” (Glucksberg & Keysar, 1993). For example, if we say that “Malala is a lioness,” it literally means that Malala is as brave and fearless as a lioness. It is widely

believed that Aristotle was the first to have used substitution metaphors for his reasoning and his conceptual communication.

Interaction refers to an interaction between the domains and the two concepts leading to a new impressive understanding. Richard (1936) proposed the interaction theory as a shift from the substitution theory to establish the fact that when a target domain is aligned with the source domain, they do not just present a literal replacement of words, rather there is human thought that engages in a rich dialogue between the two, leading to new meaning creation. Black (1962) talks about the uniqueness of this interaction where due to contexts and worldviews, this interaction can even lead to *discoveries* of new characteristics and meanings. For example, if Bill tells Margaret “John has been orphaned by his friends; we need to be by his side,” Bill may probably mean a lot more than a semantic representation of a fact that John’s friends have abandoned him. Bill may rather be conveying a deeper meaning to Margaret of the need for empathy and support that John is looking for. Margaret may get into an interaction with her mental models of association of John’s feelings, and emotions may come up with suggestions to be by his side. The influence of the metaphor on Margaret would depend on her perspective and her ability to relate to an “orphan” or an “orphaned state” shaped by her world views that in turn is shaped by her understanding, experiences, and emotions. These interactions can happen at various levels with various levels of complexity.

Whereas the substitution theory proposes a simplistic and direct transfer of association between the source and the target to establish clarity in communication, the interaction theory proposes a living dynamic process.

### 3.1 | Metaphors and management studies

Metaphors are commonly used in business and management in areas as wide ranging as organizational studies, management consultancy, change management, and branding and advertising. Lackoff and Johnson's (1980) book, *Metaphors We Live By*, attained instant popularity in various disciplines due to the socio-linguistic angle it brought in for the understanding of thought, communication and action, and their direct interaction with metaphors in everyday human engagement. In their own words

The concepts that govern our thought are not just matters of the intellect. They also govern our everyday functioning, down to

the most mundane details. Our concepts structure what we perceive, how we get around in the world, and how we relate to other people. Our conceptual system thus plays a central role in defining our everyday realities. If we are right in suggesting that our conceptual system is largely metaphorical, then the way we think, what we experience, and what we do every day a very much a matter of metaphor (Lackoff & Johnson, 1980, p. 124).

The use of metaphors in organizational narrative was popularized by Gareth Morgan's (1986) seminal work, *Images of Organisation*. Morgan talked about eight kinds of metaphors to describe organizations: machine, organism, brain, culture, political organizations, psychic prisons, transformation, and instruments of domination. Morgan's metaphors brought in a creative lens to organization studies. Metaphorical references simplified communication of complex concepts and made problem structuring in organizational studies interactive and communicative rather than rigid and unidirectional.

Jackson and Keys (1984) proposed that organizational issues and problems highlighted by metaphors can be linked to appropriate systems methodologies to guide intervention. Further, different systems metaphors and methodologies can be used in a complementary way to highlight and address different aspects of organizations and their problems. In total systems intervention, Jackson and Keys (1984) borrowed from Morgan's eight metaphors as a tool for creative problem structuring. Jackson's later works highlight the openness to other metaphors and even invites the interventionist to come up with their own metaphors (Jackson, 2019).

Metaphors are known to be widely used in branding and advertising and are intensely representational of their interactive nature. Metaphors may not always be obvious and they may need deep introspection to decipher their inner meanings and to entangle the multiple layers of interpretations they may present. These layers will exist at both the ends of the brand and its publics. These layers and their related interpretations are again dynamic and fluid going by the interaction theory of metaphors. As Zaltman (2003) says, “Metaphors do not exist as words in memory, but as networks of abstract understanding that constitute part of our mental imagery” (p. 89).

Jermier and Forbes (2012) talk of metaphors as the “foundation of organization studies” and they discuss the extensive use of metaphors in organizational interventions and change management. They substantiate their argument by highlighting the approach of industrial-organizational researchers, educators, and students who

rely on metaphors to direct their thinking. Further on, “metaphors we begin with and their associated philosophical assumptions have profound consequences for further thought and action” (Jermier & Forbes, 2012, p. 448).

Interestingly, Gregory (2007) metaphorizes the career progression of operational research and management science itself by drawing in from the “medieval guild.” She builds her argument to chart out the journey of an operations research/management science professional from the stage of an “apprentice” to that of a “journeyer” and finally becoming a “master” drawing parallels for each stage from the medieval guild with implications on the engagement process, forms of learning, and politics/power.

Coming to the practise of management consulting, use of metaphors in client communication can bring in an element of informality and casualness in such interactions where client presentations are normally straightjacketed and bounded. Metaphors can introduce an element of surprise and fun. Clients often rely on “mental pictures” (Alvesson, 1990) of problem statements and for comprehension of serious business issues. Aiding mental imagery and use of conceptual metaphors can enable consultants convey complex ideas and engage clients in a creative tension for problem solving. Such creative tension can offer a middle ground between the extremes of formality and casualness, distance and proximity, and rigidity and flexibility in client–consultant interactions.

### 3.2 | Holistic flexibility

Holistic flexibility is a conceptual lens in the domain of critical systems thinking to approach complex situations in management consulting (Chowdhury, 2019).

Critical systems thinking can be understood in terms of the three commitments of critical awareness, pluralism, and improvement. Critical awareness brings in the ability to question oneself and be critically aware with humility, openness, and tolerance. Pluralism is the ability to embrace a variety of ideas and methodologies to approach a problem situation. Improvement is the commitment that an intervention will lead to the overall improvement in the situation, empower participants, and enable the realization of the full potential of individuals and groups. Critical systems thinking brings in a comfort with creative tension, freedom of experimentation, and openness to risk taking for a systems interventionist, yet bound by the commitment to bring about positive change.

Chowdhury's (2019) work on holistic flexibility introduced a conceptual lens for systems practitioners to consider and apply the consummate relationship of holism and flexibility. “Holistic Flexibility is a dynamic interplay between a state of mind that has the ability to absorb systemic complexity, and a state of intervention that has the ability to embrace flexibility both in intent and form” (Chowdhury, 2019, p. 404). The four main dimensions of the concept are holism, flexibility, learning, and responsible outcomes.

Holism is defined as a state of mind that an individual harbours at a particular point in time. This state of mind enables a consultant to appreciate systemic characteristics through all interactions and in all social systems covertly and/or overtly. Based on the systemic characteristics, the ability of appreciating and defining boundaries is at the heart of defining a system. The ability to appreciate systemic characteristics is influenced by the three concepts of values, system, and facts (Ulrich, 2017). A systems thinker would be keen to appreciate interrelationships within the defined system of interest with subparts that display recursive behaviour. This gives rise to self-regulating systems; the behaviour has also been referred to as autopoiesis. Although for Luhmann (1988), the unit of social autopoiesis is communication, for Fuchs and Hofkirchner (2003), the unit of social autopoiesis is human actors who permanently reproduce and/or transform social structures. Interactions within the system operating under external forces give rise to emergent behaviours—both predictable and unpredictable. Social emergence can often display signs of nonlinearity.

Systems thinking and flexibility has a consummate relationship. According to Chowdhury (2019), three dimensions of flexibility can be highlighted: cognitive, formulative, and substantive. Cognitive flexibility is the ability to think flexibly; formulative flexibility is the availability of methods and approaches that enable the application of flexible thinking; and substantive flexibility is the access to resource alternatives that can bring flexibility to life. Formulative flexibility is enabled through select frameworks that can accommodate diversity and bring together systems approaches inspired by different paradigms. Substantive flexibility is the realistic and practical access to resources and one's ability to promptly select and/or adapt those resources depending on an intervention.

In the consulting journey, a consultant needs to continually learn and adapt to changing circumstances, expectations, and complexities (Chowdhury, 2019). It is this learning that brings in a dynamic interplay between holism as a state of mind and flexibility in the state of intervention to result in holistic flexibility (Chowdhury, 2019). Learning can be typified as single loop (are we

doing things right?), double loop (are we doing the right things?) and triple loop (why are we doing what we are doing?) learning (Flood & Romm, 1996).

Finally, the dimension of responsible outcomes is about an espoused and aspirational characteristic of striving for systemic value addition, emancipation, and sustainable solutions. Close engagement with the client is crucial here. A shift needs to be made from what Maula and Pouffelt (2000) say from “one-directional” to “two-directional” consulting. One-directional consulting involves knowledge flow from the consultant to the client in a directive manner (Kubr, 1996; Lippitt & Lippitt, 1979). This kind of consulting is content based (Schein, 1987) and is believed to be the “transplantation” of new ideas from the consultant to the client (Berg, Pouffelt, & Sevón, 1998). Two-directional consulting involves two-way knowledge flows between the consultant and the client with possible creation of new knowledge. This mode of consulting is nondirective (Kubr, 1996; Lippitt & Lippitt, 1979), process based (Schein, 1987) rather than content based.

The “new wave” of critical systems practice in the form of holistic flexibility can lend a powerful new lens to management consulting (foreword to Chowdhury's book by Professor Michael C. Jackson, in Chowdhury, 2019, p. viii). Due to its very nature, consulting is an inherently intellectual profession.

My motivation in this paper (call it “research problem”) is to understand if the use of metaphors aligns with the conceptual framework of holistic flexibility. Applying the framework of holistic flexibility to a large extent requires the consultant to drop their ego and be open to a discourse of ideas in the context of the larger business/management ecosystem. Holistic flexibility is an appeal to the consultant to be less ego-conscious and more sensitive to stakeholders and their surroundings.

### 3.2.1 | Metaphors and holistic flexibility

Hague (2003) talks about the intellect as an “ego-conscious” energy that strives to freeze ideas into pieces in order to rationally probe them. A direct parallel can be drawn to consulting approaches and methodologies that are proprietary to large firms or individuals who have their own brand. This also gives a false sense of mastery of reality for the consultant to which they end up having an illusion of an exclusive access to. Ego-conscious rationality has the downside of killing creativity by deciding on the limits to the creative horizon. Consultants believe that they have grasped a problem situation the best by defining it within their own frames of reference and their presentations are nothing but attempts to proselytize

their clients to believe the same. Holistic flexibility can enable the intellectual, emotional, and tactical elasticity in such a situation for consulting to move from rigidity to flexibility and ego-consciousness to ego-vulnerability.

Holistic flexibility is an antithesis to the conventional image of management consulting that we often encounter bound by the state of ego-consciousness.

Use of metaphors can bring in a refreshing atmosphere in the client–consultant relationship in which both sides can experience certain benefits. These benefits can be categorized as under the context of holistic flexibility.

#### *Creative tension*

Metaphors shake up the consulting monotony represented through the means of defined methodologies and straightjacketed presentations by introducing creative tension in the process. The use of metaphors do not make obvious or definitive descriptions about a problem situation or a solution. But they open up a plethora of references, questions, assertions, and doubts that can offer limitless possibilities for an ego-free appreciation of where one is and where they may want to be. Metaphors can bring in a creative tension to a space that is otherwise defined by logical rationality and definitive interpretations. This journey can continue as a complex adaptive system itself in which the consultant needs to be comfortable. The client and the consultant can together map their territory with metaphors as they go along. In the words of Hardman (2019), “The intuitive creator must go boldly ahead, one foot in front of the other, uncertain of where this may lead. The ‘not-knowing’ is what drives the process forward in search of fresh, unexplored territory” (p.85).

#### *Dialogic openness*

Creative tension of metaphors provide a fertile ground to both consultants and clients to shed their ego and engage in an intense process of dialogic openness. I borrow the term “dialogic openness” from Christodoulou (2012) to refer to the revelation of different forms of tension due to the clash of forces. Tension and openness can become a circular loop where “subjectivity and meaning is always in the process of becoming” Christodoulou (2012). The consultant and the client is able to co-create the reality as a creative journey to dissolve rather than a problem identification to solve.

#### *Humble informality*

Metaphors can bring in a sense of informality in the highly formal client–consultant relationship. A metaphorical presentation of a complex situation or problem diagnosis can not only introduce a sense of light

heartedness in the communication but also open up creative tension and dialogic openness (discussed above). This informality comes with a great sense of humility for the consultant where whatever metaphor they create, as much as it is a representation of their own interpretation, it is also a canvass for the client to impose their own interpretation. As Heidegger says, “the artist remains inconsequential as compared to the work, almost like a passageway that destroys itself in the creative process for the work to emerge” (Heidegger, 1950/Heidegger, 1993, p. 166; as cited in Hardman, 2019).

Metaphors open up our minds, offer a break from monotony, and instigate us to come up with new ideas for the situations we encounter. Metaphors therefore provide us with “mental models” (Lackoff & Johnson, 1980) that lead us towards determining realities in a manner that may be unconventional and novel.

Having talked about the relationship between metaphors to organizational studies in general and holistic flexibility in particular, I will now present select case narratives of my own use of metaphors as a tool for creative consulting.

## 4 | CASE NARRATIVES

I will share four case narratives from specific consulting projects where I used metaphors as a tool in the client engagement. These cases were based between the time period of years 2014 and 2018 in India.

Once a mandate is awarded, at a very high level, a typical consulting engagement goes through the stages of objective setting, situational analyses, reporting, and problem solving. We (the consulting team) took the route of problem structuring rather than the typical stages in each of these projects. Problem structuring is an inclusive approach to drill down an issue to inherent causes of “real issues” with a range of multi-paradigm techniques that otherwise may get treated symptomatically. Each of the situations brought to us its own expectations, complexities, and situational nuances. As a team, we wanted to break conventional consulting formalities and introduce creativity in our problem structuring approach and consequent client reporting. In the case narratives below, I will talk about the situation (client context, expectation, and research process), the metaphorical reference used (reasoning and implications), and the experience and affect (client reaction/experience and client–consultant engagement).

I would like to highlight key contributions made by my then colleagues, Ashu Sabharwal and Ruchi Sachdeva, without whom this work would not have been

possible. Our team worked with the strategic guidance and mentorship of Vivek Pradeep Rana.

In the case narratives below, I will use the terms “client” and “company” interchangeably.

### 4.1 | Theatre

#### 4.1.1 | Situation

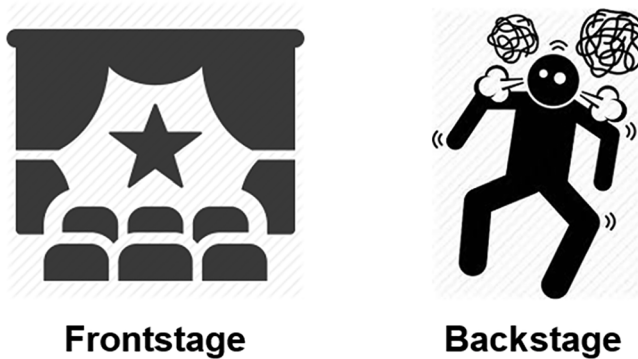
The client was a legacy Indian conglomerate with primary businesses in home textiles and metal pipes. The company operated in India and in several international locations including North and South America, Europe, and Southeast Asia. Our consulting mandate focused on the two primary businesses. The company both witnessed fast growth in these businesses and attained global prominence due to its ability to find solutions to complex problems, innovation, ability to execute demanding orders, and satisfactory customer service. Both businesses were adorned with several international awards and recognitions.

However, fast growth and diversification meant that the company was always focused on business operations and technical excellence. It did not have the time to work on the “soft” dimensions of branding and culture. The brand meant different things to different stakeholders, and the company wanted to develop a “one voice” for all engagements internally and externally. We (the consultants) were mandated to articulate the brand messaging and define its meaning.

Our first objective was to understand the key characteristics of the businesses separately to identify overall alignments and gaps so that the overall journey of creating a one voice is informed and enriched. Our design for problem structuring included an immersive approach where we worked closely with both internal and external stakeholders to appreciate the nature of the businesses. Internal stakeholders included the top management and employees (including shop floor factory workers), and external stakeholders included investors, the media, B2B customers, and B2C consumers (for the textile business).

#### 4.1.2 | Metaphorical reference

The metaphorical reference we resorted to in this case was that of theatre, where the front stage (final customer delivery) is normally perfect and entertaining, and a backstage (where the real work gets done) is normally chaotic and constantly changing. This is represented in Figure 1.



**FIGURE 1** Metaphor of theatre (image created/formatted by the consulting team)

### *Front stage*

The front stage is the best show of the performance. There could be some coordination issues leading to glitches, but overall, the audience is entertained with a good performance.

The company's customer satisfaction was supported by world-class infrastructure; this gave a great impression to its customers. Products were of high quality and had met specifications, and the company was known for on-time delivery with competitive cost. It was also committed to the society and supported several initiatives in villages where its factories existed; these initiatives included work in the space of education, women's empowerment, and environment. Model villages were created. Women at home were trained to recycle waste and produce useful products that found international markets facilitated by the company's international connects. The top management of the company was known to be always available to customers and was just a phone call away. They were willing to collaborate and overcome challenges whenever such situations arose. The scale of the business itself and its global recognition provided a stamp of assurance to the external world.

The following are statements that customers had to say about the company:

“They are a true partner ... as an organization I feel they do understand us. Partner is not about getting an order and shipping goods it is about someone who understands our objectives, our vision, relates to our vision so they do that well and walk with us in a healthy manner.”

“In terms of quality they are the best in the country.”

The performance in the front stage however came at a cost in the backstage.

### *Backstage*

The backstage is a chaotic space of last-minute changes, emergencies relating to actors, costumes and props, confusions in sequence, and technical glitches.

Similar was the situation observed in the operations and internal processes of the company. Transfer of knowledge within the organization was a challenge. The organization structure was unclear with no defined role of middle management. This led to a lack of accountability over deliverables and process adherence. The same got reflected in external interface of the organization—both with vendors and suppliers and with customers. Knowledge management was a serious challenge with the complete lack of a single knowledge repository. This led to long lead time for routine queries that would often affect customer commitment. Due to lack of transparency, delays in pre-production stage were common. Flexibility was a challenge and operations suffered if any deviation had to be accommodated. Top management often ended up getting involved in day-to-day crisis management. Confusions also led to team hostilities from time to time.

The following are some statements that the team had to share:

“There are 5 people assigned to me but only one would act - who is doing what I don't know - the others are just there for relations - so if 5 people on the email - if the one who is doing all the action is missing or absent - then nobody has the answer. They are not short on people but they need to distribute work properly.”

“Sometimes, on basic quality or delivery issues we need to get the Chairman involved. Clearly for a company of our size it should not be the case.”

Our metaphorical references paved the way for a much deeper and broader conversation with the client that led to discussions beyond the initial mandate. I will discuss this in detail in the next section.

### **4.1.3 | Experience and affect**

The use of metaphors lets us have the liberty to challenge boundaries of our consulting mandate and take advantage of the creative tension to go much beyond recommendations pertaining to brand and culture. We exercised our creative liberties to have open conversations during our stakeholder listening meetings, and insights generated from them were found to be greatly

valuable for the client. This led us to make specific recommendations that the client found important to be considered.

Talking specifically about branding, the area we were originally called in for, our recommendations included creation of a message that would represent the tenets of leadership, futuristic attitude, and inclusion. We based this to articulate the tagline for the company and work on design parameters that would reflect this essence. Over a period of time, we worked with the corporate communications team to streamline the overall internal and external communication accordingly.

The client appreciated our perspectives on areas beyond our specific mandate. Our insights let the top management expose their vulnerabilities and share their perspectives and opinions more frankly. This further lets us have a richer understanding of the company.

Our creative liberty exercised through the use of metaphors also led to specific business centric and operational inputs that I mentioned above. Some of such recommendations included introducing backward integration for the company so that it could have greater control over both costs and timelines and enjoy relative immunity from market fluctuations. Other insights included introduction of industry/customer meets for showcasing latest developments and achievements and exchange of technological ideas. Regular factory visits for customers were also suggested. We recommended creation of authorized nodal points for better customer service and assigning of relationship manager for every key account.

All our recommendations were substantiated under the parameters of process, execution, and messaging, and, finally, all aligned to the core values of the company.

## 4.2 | Soil layers

### 4.2.1 | Situation

The client for this case is the same that I discussed above in Section 4.1.1.

As part of the problem structuring exercise, we also unearthed several people-related insights in the company, including those on its culture and human resource (HR) practices. Although, being a legacy organization where many employees served in the company for a significant period of time, there was dwindling organizational affinity as one moved down the hierarchy. As a whole, people did not realize or recognize a “one organisational vision” as they had joined the company at different times and in different businesses and places.

This led to a sense of disarray and disengagement. The top management was distant from the real issues on the ground and wanted to explore how the situation could be improved.

The company wanted to develop a one voice for the group that would engage all stakeholders and would elevate it as an enduring business. Employees were recognized as a priority stakeholder group for this exercise. The client not only wanted us to “diagnose” what the triggers of disengagement were but also wanted us to leverage on the one voice to translate the same into employee initiatives that would create internal bonding and a sense of association.

Our immersive design for problem structuring revealed different characteristics of employee affinity and beliefs as one moved from the senior to the junior levels. We wanted to introduce a metaphor that would depict this changing landscape in a relatable manner for the client presentation.

### 4.2.2 | Metaphorical reference

The metaphorical reference we arrived at was the “soil layers” because we realized that the different employee layers demonstrated characteristics similar to the different layers of the soil: humus (promoters), transitional topsoil–subsoil (leaders & senior management), weathered rock (mid-management), and bedrock (shop floor workers). This is represented in Figure 2. I will elaborate this further in the following discussion.

#### *Humus*

Humus is the most mineral-rich and fertile upper layer of the soil.

This was the layer of promoters who primarily comprised three close relatives. They strived on leadership through innovation, fast decision making, risk taking,



**FIGURE 2** Metaphor of soil layers (image created/formatted by the consulting team) [Colour figure can be viewed at [wileyonlinelibrary.com](http://wileyonlinelibrary.com)]



facing challenges, and speed and impatience. They had ambitious growth plans for the company and wanted to offer growth opportunities for all employees. They aspired to build excellence on both the B2B and B2C angles of the company by driving innovation and being agents of change. Their passion was reflected on the fact that they were hands-on in the business despite the scale. They aspired to build trust for all and create an enviable brand reputation through giving back to the society and the environment. They believed that respect for the triple bottom line (financial, environmental, and social) is paramount in building long-term corporate reputation.

They expressed their passion in statements such as

“As a group we genuinely believe that whatever business we get in, we have to acquire leadership position. That’s there in the mission statement also. It’s the generic DNA of the business. The business has figured out a way of what is that part that will take us to the leadership position.”

This layer was the torch bearer for the whole company. It was important that the rest of the organization aligned with their passion and values.

#### *Transitional topsoil–subsoil*

This is the transitional layer where substances move down from the humus and serves an “accumulation” function.

This was the senior management comprising leaders and C-suite leaders who reported directly to the promoters. Passion ran very high and was palpable each time we meet any of these senior leaders. They mirrored the promoters’ vision and were in-sync with the speed, impatience, aggression, and risk-taking characteristics. They aligned themselves with the promoters with a sense of belonging and pride.

They expressed themselves in statements such as

“We work like speed, we are daring, we are ahead of competition, believe in product development, innovation, new ideas, emphasis on product quality, budget for continuous innovation. The way we grew, we are an example of real team work. We do CSR straight from our heart. We wish to grow at all times and have international-level standards.”

However, as we moved down, we noticed gaps surfacing where the same level and passion were amiss. The passion and speed seemed to have a downside of manifesting itself in unconstructive ways for the levels below. Passion manifested itself as lack of tolerance and impatience, and speed manifested itself as aggression and high pressure. This layer failed in percolating the management vision below.

#### *Weathered rock*

This is the poorly weathered layer of weathered rock and soluble compounds.

This level consisted of middle managers and doers who were directly impacted by the characteristics of impatience, intolerance, aggression, and high pressure displayed by the layer above them. They displayed a lack of bonding with the overall organization, and issues such as their dissatisfaction with rewards, work–life balance, and lack of feeling recognized surfaced. They saw themselves as mere cogs in the wheel to follow instructions and who were never consulted or involved in any decision making. This killed their emotions and created an artificial distance from the company. They were not privy to the big picture and therefore they felt disconnected and dispensable.

They expressed themselves in statements such as

“We are not part of that vision; we do not associate with the company vision or mission. We don’t feel we are contributing to the vision or mission. We are there only in the execution part not in decision making.”

The middle management was the most important layer in the organization being the largest cohort of white-collar workers. They were also the primary link to the blue-collar workers that were the backbone for the company, being a manufacturing-led business. A missing link here could cause serious damage to the whole business.

#### *Bedrock*

Bedrock is the base of the profile comprising continuous rock masses.

Represented here by the shop floor workers who felt disconnected with no emotional attachment. They were ignorant about the company’s innovations or product specialty and believed they were working for “any other company” without any sense of association. In the local factory area, where other companies also had their

factories, workers did not consider our client to have any differential as an employer. They appreciated the social contribution made by the company but believed that their plight as workers could be much bettered if the company adopted more fair personnel practices.

They expressed themselves in statements such as

“[Competitor name] is an amazing employer. Staff and workers are treated alike. Workers just like staff get compensatory and medical leave. Here, there is discrimination. They may lay you off anytime. Every year employees lay-off happens. No prior information, or any sort of communication is given to the workers who are to be laid off. This has been happening since last three years.”

High employee turnover was common at this level.

#### 4.2.3 | Experience and affect

Prior to this project, the company had not undertaken a formal and external employee listening exercise. Our project brought to light several nuances of the company that the promoters and top management found valuable; the HR director was part of the top management. He was present during our final client presentation, and it was likely that our findings would put him in a critical spot. Our use of metaphors not only enabled us to present our findings in a creative manner but also paved the way for our presentation to be non-intimidating and neutral. The client experience transformed from what was initially perceived to be consultant presentations to creative, immersive, and inclusive workshops. Observing, understanding, relating, and deciding came along as part of these workshops.

Dialogic openness led us to understand that there was a considerable gap between the external image of the company and its internal employee promise. Gaps in the findings were presented not as criticisms to HR, but as improvement areas that the team had to collaboratively work on. The client HR began to accept us as part of their extended team.

Our mandate then extended to the articulation of an employee promise for the company and align key HR processes to the same. Processes identified for intervention included talent acquisition and induction, career planning, performance management system, and rewards and recognition.

The client finally became more open and transparent due to a level of trust and affinity established between the teams. Series of deliberations with function heads and unit managers led us to understand specific drivers of engagement for employees. These included innovation, execution, integrity, and community. We aligned our recommendations around those lines that would enable innovation at the workplace, support speed and quality in execution, and at the same time be able to create meaningful communities.

### 4.3 | Human anatomy

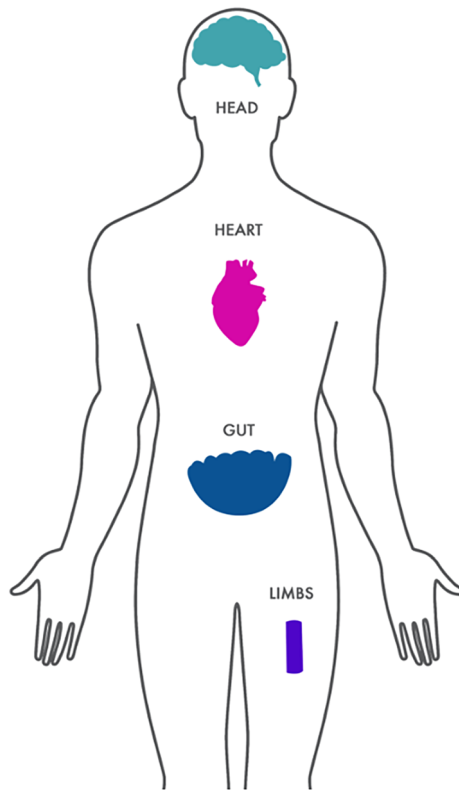
#### 4.3.1 | Situation

The client was a family-owned business conglomerate operating in four industries—construction, real estate, hospitality, and activated carbon. Top management of the company was constituted of nine members of the promoter family and two nonfamily professionals; this 11-member team was called the “family board” and was responsible to provide leadership and direction to the four businesses. All four businesses were witnessing fast-paced growth, but they had their own characteristics and nuances in their own respective sectors, and due to the personal association levels of the individual members of the promoter family to the specific businesses.

As the group set itself to leverage the buoyant business environment, a second generation of highly qualified professionals and aspiring family members were brought in to drive management excellence. The enterprise was at a crucial junction of convergence and divergence. The convergence was about a new leadership blood gushing in to amalgamate with a strong legacy; the divergence was about this new energy to leapfrog the group into new growth, new territories, and a new horizon. In order to make this a seamless journey, it was then time to take stock and reflect on some existential aspects: “who we are, what we do, what we stand for.” The need was for the articulation of the group's foundational values and core message; this would be leveraged to create impactful public relations strategies to touch internal and external stakeholders.

#### 4.3.2 | Metaphorical reference

The metaphorical reference we applied here was from human anatomy—heart, head, gut, and limb—each metaphor representing different characteristics of the company that were also being reflected differently for each business. This is represented in Figure 3.



**FIGURE 3** Metaphor of human anatomy (image created/formatted by the consulting team) [Colour figure can be viewed at [wileyonlinelibrary.com](http://wileyonlinelibrary.com)]

### *Heart*

The heart represents passion, feelings, and emotions.

The company was overall found to be weighted more towards its heart than any other metaphorical organ. This was a manifestation of the intense involvement of the founder and chairman in every business they operated in; he had immense passion and expertise for construction, the main business, and lifeline. This gave the founder the liberty to take decisions and invest in other sectors he identified with himself. The founder was extremely committed to the cause of the underprivileged and believed in empowering the society through his initiatives in education, women's empowerment, and livelihoods. The same was reflected in the family board that believed in people centricity, welfare, interdependence, and trust.

On the upside, the company forged strong relationships with stakeholders and focused on delivering the best customer value and experience. Professionals were highly empowered, despite close involvement from the family board. The communities where the project and manufacturing sites existed benefited from welfare activities.

On the downside, preference for employment and role was not always based on competence, but based on

relationship and familiarity. Process dependency was overridden by people dependency. Decisions were often taken on emotional appeal and a sense of goodwill rather than on serious business planning. Often, wrongdoings of extended family members were overlooked.

### *Head*

The head represents logic, reason, and rational decision making.

For the company, it was always the heart that moved first, followed by the head. Once the founder desired to get into a business or wanted to exercise his passion for something, he would first commit to it. Consideration of business parameters and strategic planning would follow.

In construction, the head was demonstrated by instant planning and real-time delivery of projects, but there was no clear articulation of operating models—a manifestation of heart over head. Being the cash cow, the head would direct energy and clarity on professional operations, and an obvious and direct drive for profitability. But the heart-over-head syndrome also meant a poor business pipeline and lack of a scalable business model. A long-term vision was absent, and the company operated more in a reactive mode.

### *Gut*

The gut represents instinct and drives ambition—fire in the belly!

The family board that constituted the top management, especially the founder, was gifted with good instincts to choose the businesses and projects it wanted to go after. The company had the hunger to do more, take risks, and try out things for the first time in the industry.

Although the gift of instinct and fire in ambition was great to “get the job done,” there was a lack of focus on driving greater volumes and reduce the gap with competition. There were also times when gut was not right and the overreliance on it led to ambitious employees' sense of lack of direction and vision.

### *Limb*

The limb meant to be a representative of movement; read this as “execution” for the purpose of this discussion.

The company was known for its operational excellence and execution efficiencies. Execution was driven by strong leadership and tenured management who understood their respective domains. Aggressive deadlines, customer expectations, and market forces left no room for error. Projects and deliveries were usually on time and beyond expected quality that was lauded consistently by customers. This also ensured repeat business and growing trust with stakeholders.

However, there was a lack of systemic support to make execution foolproof. It was usually individual leadership and drive that sought to overcome odds to make expectations a reality. Therefore, consistency between projects and experiences suffered. Although being a major business, the company was operating in the start-up mode.

### 4.3.3 | Experience and affect

The use of metaphors led to a creative tension during our client workshops that included the family board. This gave the dialogic openness to both sides—client and consultants—to discuss business challenges that went beyond the initial consulting mandate.

Having completed the immersive research and a series of deliberations with the family board, we articulated four cherished and desired forward-looking characteristics of the organization that we agreed would shape our messaging and communication initiatives. These were

- Think ahead (to mean foresight; dare to create if nothing exists but the need is felt; to be a pioneer)
- Think for all (to indicate business with a purpose; all should benefit; no exploitation; high safety standards)
- Think before you commit (aspiring for well-planned and thought-through ideas; devil is in the detail)
- Do not think after you commit. Deliver. (promise of 100% delivery without any compromise)

Our primary recommendation was to bring about a vision convergence for the family board in terms of the company's values, vision, and brand. Outcomes were identified around three parameters: business consolidation, talent management, and brand alignment.

Use of metaphors also led to a sense of informality between the client and us. We were able to excite the founder and his immediate family with a creative tool that they had not encountered before in the professional setting. The relationship grew deeper, and the client mandated additional exciting work for us that primarily involved implementation of some of our recommendations.

## 4.4 | Parenting

### 4.4.1 | Situation

The client was a leading global professional services firm operating in the fields of audit, tax, and advisory.

The company aspired to position itself in the market as the leader in digital transformation through the end-to-end process of strategy to execution to deliver business results for its customers. This significant transformation needed strong communications to help its stakeholders understand the wider scope of services being offered as well as the value that could be unlocked by working with a firm that both designed and executed on the change businesses were looking for. Our work also needed to serve the purpose of changing the legacy positioning the firm had that did not have inferences to its technology-transformation expertise. The overall vision of this programme was to enable our client gain greater business traction by better client acquisition.

Our project commenced with a detailed listening exercise with the firm's internal and external stakeholders. Our strategy was to eventually recommend a stakeholder-specific communications campaign; this directed us to design our research with the following stakeholder cohorts in mind: customers, government agencies (some of which were also customers), industry bodies, partners (including key service providers), analysts, employees, and the media.

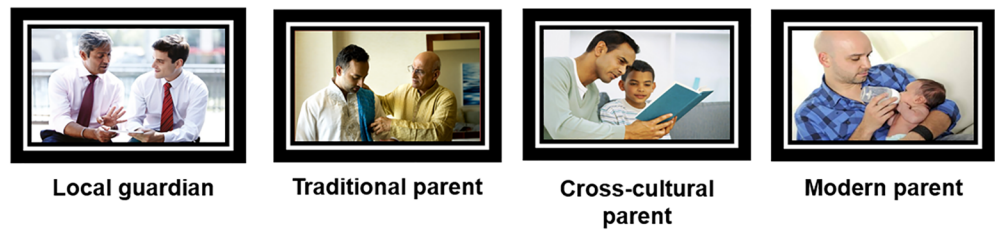
The intent of the survey was to capture the insights that would help us understand stakeholder perception of our client and the triggers for perception change. Insights from this would fuel the custom-design of the final communications strategy specifically for customers.

The presentation of our research however moved away from a stakeholder-based influencer understanding of our client customers to a metaphor-based one.

### 4.4.2 | Metaphorical reference

We resorted to four parenting metaphors to represent the kinds of customers that existed—local guardian (representing a CXO of a large global company with global exposure currently attached to the local operations; could be a native or an expatriate), traditional parent (CXO of promoter-led organization, someone who has been associated with the organization for long and has trust of promoter and is implementing their vision/direction), cross-cultural parent (CXO of large organization with rich global experience mostly with multinational corporations and has worked with most consulting firms in the past and has been part of major transformations in prior roles), and modern parent (CXO/founder of new age technology-powered business, hands on, digital native/tech savvy, and highly energetic). This is represented in Figure 4.

**FIGURE 4** Metaphor of parenting (image created/formatted by the consulting team) [Colour figure can be viewed at [wileyonlinelibrary.com](http://wileyonlinelibrary.com)]



### *Local guardian*

A local guardian in literal terms is understood to be one who is entrusted with protecting and guiding someone whose immediate elder relatives (normally parents) are geographically away from the site of the incumbent.

This metaphor was used to describe a CXO of a large global company with global exposure and currently attached to a country-level local operation; the incumbent could be a native or an expatriate. They had to follow a global mandate and had limited say on strategic issues. They were focused on alignment with global business and achievement of country-specific targets by applying best practices, processes, and solutions at the country level. Strategy normally came under global mandate and needed sanctions for large-scale or expensive projects. They normally consumed information in the form of curated snippets often gathered by a specialized strategy/business intelligence team; they resorted to long-format content only to read in-depth analysis and not news items. Business magazines and financial papers, flipboard/curated content apps, interesting speakers, and peer interactions on multiple forums were information consumption mediums for this set of customers.

Their trigger for digital transformation came from making the most of innovative digital technologies and using data to create differentiating customer value. They would also look for solutions to reach out to customers directly and have more control over delivery.

They typically used an external professional services firm for specific projects with limited scope and for regulatory or compliance issues.

They identified our client as primarily a tax and audit firm and did not associate them with strategy or innovative solutions.

### *Traditional parent*

A traditional parent is one who is closely connected with their child and feels completely accountable to them.

This metaphor was used to describe a CXO of a promoter-led local organization; someone who had been associated with the organization for long, had trust of promoter, and was implementing their vision and direction. Their decision-making power was limited as the promoter or a family member called the shots, and they mostly had executorial authority. This individual was

responsible to ensure that the organization delivered on revenue and was ready for the future. They also guided the succession process from the founder to the next generation and balanced interests of stakeholders. They felt that they were more equipped to handle their business than any outsider. Their opinion was that consultants did not immerse enough to be able to empathize with the promoter's vision, concerns, and decision-making criteria. They were also of the opinion that an outsider would not play the mentoring role required in a generational shift and would not invest the amount of time required. They feared that consultants came in with an attitude that everything needed to be changed.

Their trigger for transformation came from the requirement of coming up to speed with industry and competition and stay in sync with rapidly changing processes. They wanted to support the next generation that was coming at the helm of affairs with different priorities and perspectives. They typically engaged with an external professional service firm for smaller pieces of diagnostics, regulatory, and compliance requirements and for select areas in which they felt their competence or expertise was lacking; it was common for them to work with external consultants when they wanted to enter a new market or a new category.

This set of people consumed information through press articles, referrals, reports, and case studies. Direct personal contacts, neutral industry forums, and discussions with and reference checks from peers influenced their decision-making pattern. They were low in social media consumption.

Their perception of us client was that of a finance, tax, and audit firm and not that of a partner in long-term transformation.

### *Cross-cultural parent*

A cross-cultural parent is one who would have lived and worked in diverse places and/or sectors and would have certainly had the opportunity to interact with teams from more than one culture. A cross-cultural parent would ideally have a relatively liberal perspective.

This metaphor was used to describe a CXO of a large local organization with rich global experience mostly with multinational corporations. They would have had an exposure of working with large consulting firms and

would have already been part of major transformations in their past roles. Most decision-making authority was vested with them as complete mandate from the promoter to run the business as per their vision and ethos. Their role was to captain the organization and steer it according to their judgement and deliver the numbers committed to the promoters. They strived to maximize the potential of current businesses and also explored new opportunities. They felt that they and other functional heads in the organization knew their business best, and, accordingly, they defined the vision, strategy, and direction for their organization.

Their triggers for transformation came from the need to align business with industry best practices, enhancing team capabilities, and to equip the organization moving away from centralised decision making to a decentralised one for quicker reaction times. They also wanted to make the most of digital technologies to maximize market share by offering better value to their customers. They would have used consultants for tax and regulatory purposes, for new business or new market strategy, and organizational design or for implementing best practices.

They would normally rely on curated feeds, explainer videos, and in-depth articles for information. They would read newspapers mostly for news and not for business decisions. They sought thought-shaping conversations and ideas that challenged their thinking. Word of mouth in their own circles, interactions with consulting firm partners and their team, offsite meetings, and conferences would play an important role in their decision-making journey.

#### *Modern parent*

A modern parent is one who balances work, social, and personal lives and tries to bring the best from both traditional and modern values.

This metaphor was used to refer to a CXO/founder of a new age (usually technology-powered) business, who would be hands-on, a digital native, technology savvy, energetic, enthusiastic, and with good international exposure. They would have absolute authority over any decision making as they were the founder and would have built the organization from scratch. This meant that they were also completely entrenched in every aspect of the business.

They would drive the organization from the front and keep it on track towards exponential growth by onboarding and engaging a superior team, applying the best processes, and making quick adaptations wherever required. They preferred to do things internally and build capabilities in-house by hiring experts. Their organizations would not have yet faced issues that would have mandated process changes. They would also not explore

outward for technology strategy as considerable expertise would be available in-house.

They saw transformation as a continuous process of self-improvement and multiple subtasks that took them towards achieving overall business goals and realize their vision. They normally used professional service firms for regulatory issues or for specific projects.

They would have a digital-first mindset in their content-consumption behaviour that helped gather specific information and cut through the clutter. They looked for industry reports, market research insights, and case studies (proof of concept), articles of interest. They were active on social media, enjoyed personal informal conversations, and had little interest in print and television.

Their impression of our client was that of a finance, tax, and audit firm. They knew of their advisory practice as they would probably have friends and peers working for the company. However, they did not associate our client with strategy.

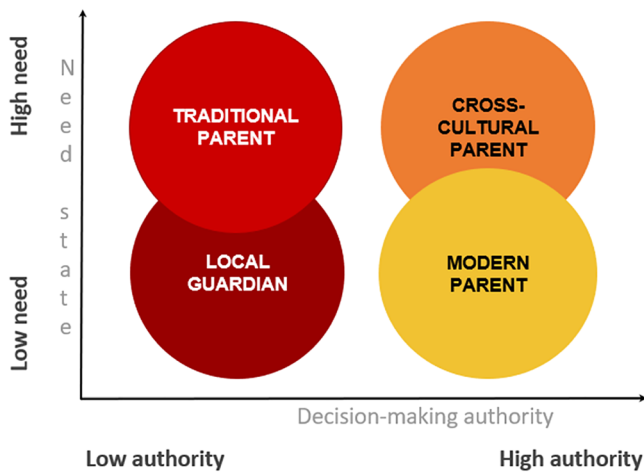
#### **4.4.3 | Experience and affect**

Adopting a metaphorical approach for our problem structuring enabled a creative tension for us to consider customers as “personas” rather than “stakeholders” for the purpose of this project. Personas are “fictional characters, which you create based upon your research in order to represent the different user types that might use your service, product, site, or brand in a similar way” (Dam & Siang, 2018). Personas help in understanding a target segment, their thought process, their information consumption habits, reference points, and decision-making behaviour. This understanding helped us in crafting specific interaction levers for each persona. These perspectives may not be mutually exclusive, and the personas may have characteristics that are overlapping and sometimes similar.

We categorized our insights about each persona under the following parameters: illustrative role, decision-making authority, triggers for digital transformation, their current impression of professional services firms in general and of our client in particular, barriers to adoption of external support, current perception of our clients, and, finally, their information consumption habits including their influence levers.

From a business perspective, we sensed different opportunity levels for the different personas for our client. To make sense of this conclusion, we created an opportunity grid that is represented in Figure 5.

The opportunity grid represented in Figure 5 has two axes: The x-axis represents the decision-making authority of the persona, and the y-axis represents their



**FIGURE 5** Opportunity grid as per persona (image created/formatted by the consulting team) [Colour figure can be viewed at [wileyonlinelibrary.com](http://wileyonlinelibrary.com)]

need for digital transformation. We sensed greater opportunities for business with a “cross-cultural parent” for our client. This is the top-right quadrant. Here, the decision maker had a mandate of aligning business with industry best practices. Decision making rested with the professional CXO, and they were interested in making the most of digital technologies. Further, the “local guardian” had low need for transformation consultancy and also low authority. Hence, they found a place in the bottom-left quadrant. They were not to be sought out proactively.

Workshops with our client based on the personas led to the realization of several desired behaviours for our client. These included the need to communicate beyond work and the need to engage in topical discussions with lesser protocol; the need to instil trust by showcasing best team members with relevant experience; the need to address the problem of attrition in middle- and junior-level team members that indicated instability to customers; the need to build relationships at multiple levels; and, finally, the need to design messaging and engagement tactics based on personas, rather than based on traditional stakeholder cohorts.

The last realization above was significant from the perspective that it brought about a paradigm shift in how our client strategized business-centric communication. The use of metaphors brought about a creative openness for us to design and implement communication strategies that were more topical, more relevant, and more effective. Our client found this approach unusual and enriching in the context under consideration.

## 5 | REFLECTIONS

### 5.1 | Holistic flexibility

Having presented four case narratives, I would like to now reflect on my experience and learning from the use of metaphors. Earlier, I talked about creative tension, dialogic openness, and humble informality as benefits in the context of holistic flexibility when metaphors are used as a tool for management consulting. I will structure this discussion under the same three heads.

#### 5.1.1 | Creative tension

Metaphors open up a plethora of references, questions, assertions, and doubts that can offer limitless possibilities for an ego-free appreciation of where one is where they may want to be. This is true for both sides—the client and the consultant.

The use of metaphors in each of the case narratives was a creative experience that challenged conventional boundaries of problem solving and client communication. The openness and risk-taking appetite to exercise this creativity was significantly enabled by the diversity in background and experience that our team of consultants came from for each of the cases (the team was the same)—one public relations specialist, one brand communications expert, one market researcher, and one management consultant (myself). Our creativities were enriched by the different cultural and organizational backgrounds (Csikszentmihalyi, 1996); if all members of the team were from the same background, this level of creative tension might not have been possible. The diversity in our team meant that each one of us came with different judgements, approaches to fact finding, and boundary judgements that are fundamental to the element of boundaries that lie at the core of holism in holistic flexibility (Chowdhury, 2019).

Creativity was brought to life in bold and unconventional ways by the use of distinct and varied metaphors such as theatre, soil layers, human anatomy, and parenting. Our thinking received fillip from the conditions in which we were operating. Not only the four of us as consultants had both the expertise and humility as a healthy mix but also the clients who provided an open atmosphere to embrace an alternate way of engagement. It is needless to say that our conversations and thinking were greatly informed and enriched by the insights that came to us through informal discussions within our team and with the client team. Ackoff (1978) similarly talks about creativity as

a factor of both individual talent and the system itself. He further argues that creativity requires courage and risk-taking abilities to enable the best talent to be exposed.

As a team, we operated with great flexibility and demonstrated a break from rigid styles of presenting a consulting research. At the same time, it is to be noted that our creative freedom was accompanied by a sense of responsibility of delivering to the client mandate. Although I will discuss this more in the following sections, here I will further note that creativity is greatly complemented with “other” realms of life that we are influenced by and that inform us in this journey. Cordoba-Pachon (2019), p.116 talks about three orientations to maximize this energy in his book *Managing creativity: A systems thinking journey*:

- Self-cultivation is about being more mindful about the self as a small part in the larger universe. This may make us feel “light” and slightly less rigid.
- Reclaiming failure means not taking failure with contempt, enabling creativity to enter our lives to enrich our experiences with more freedom and autonomy.
- Encouraging open and responsible engagement with the present means being able to recognize our own self and the surrounding world to work towards positive shifts in the world.

Our creative journey in the case narratives presented above reflected the above orientations to a great extent. We broke away from traditions, we exercised freedom, and we were not afraid to expose ourselves to our own vulnerabilities. This required sincere flexibility—both cognitive and formulative—to make sense of the blue-ocean thought process. At the same time, we demonstrated a deep sense of commitment to the client mandate that let us draw our own boundaries of the creative process and present insights that were business relevant and actionable.

Creativity in the context of management consulting should not mean an open ground for irresponsible behaviour; it is rather an open ground to channelize our transient energies towards responsible outcomes. These are essential tenets of holistic flexibility where Chowdhury (2019) talks about the fine balance between creative explorations and sincere client delivery. “Self-cultivation” (Cordoba-Pachon, 2019) helped us to be constantly aware of the bigger picture we were operating under, yet drawing our own boundaries with conscious value judgements in a dialogic process, an essential element of holism as defined in holistic flexibility.

### 5.1.2 | Dialogic openness

Metaphors provide a fertile ground to both consultants and clients to shed their ego and engage in an intense process of dialogic openness.

The quality of client–consultant interaction was immensely benefited due to a sense of openness and informality that the metaphorical references brought in. In each of the cases, our team was able to break artificial barriers that normally exist between clients and consultants resulting in excessive formality. It is interesting to note that management consulting is “driven by ideas” (Darby & Lavin, 2002) and yet consulting reports are often devoid of ideas or fluidity in thought process due to an apparent need to adhere to precise reporting, justifiable strategies, and sharp recommendations. The quality of the client–consultant interaction is therefore highly value-driven where every interaction may be counted as quality of advisory derived by the client.

Additionally, metaphors allowed us to structure the problems in new unconventional ways. The creative process enabled us to break away from the rigidity of working to find a solution for the initial problem statement and explore other business-relevant issues that the clients were facing and make recommendations that had much far-reaching effect than for us delivering to a particular client ask. Some of the problems identified were not for which we had a solution or a recommendation; but these were important for us to present as part of the problem structuring and client-engagement process. This aligns well to the aspect of “responsible outcomes” as espoused in holistic flexibility. Responsible outcomes focus on delivering sustainable client solutions that go beyond a one-time project mandate contracted out to a consultant (Chowdhury, 2019).

Rosenhead (1996) talks about “problem structuring” as a method that satisfices rather than solves and exposes conflicts transparently in a non-intimidating manner. Further, it involves people as agents of change in an inclusive and empowering manner. In all the four cases, we involved a wide variety of stakeholders as part of our research to delve deep into the respective situations. Voices across levels and stakeholder cohorts were openly presented to the client. The use of metaphors opened up an active two-way dialogue and involved the client as owners of finding solutions as well—a responsibility often passed on to the consultant as a deliverable. Creative tension and dialogic openness were active enablers in a collaborative knowledge-creation process. Knowledge was enriched with both explicit and tacit knowledge where both sides were involved. This combination can greatly enhance the consultant-to-client knowledge transfer process (Kirsch, Ko, & King, 2005; Lahti & Beyerlein,



2000). These are aspects that brought to life responsible outcomes of holistic flexibility that talk about intense open ego-free collaboration in the client-consultant interaction.

Dialogic openness enabled pushing consideration of several other factors and aspects that were beyond the immediate scope of the consulting mandates, as I have discussed under the “experience and affect” section for each case narrative. We were able to identify opportunity areas in the organizational setting that represented interrelationships and emergent patterns for us to make much wider recommendations for our clients than what was immediately identified in the initial ask. Interrelationships and emergence as part of holism are important considerations for a systems consultant as identified in holistic flexibility (Chowdhury, 2019).

### 5.1.3 | Humble informality

Metaphors can bring in a sense of informality in the highly formal client-consultant relationship.

Use of metaphors in experience eased the artificial divide between the client and us and let us have a more informal and open dialogue about the actual situation we were trying to address. There were certain characteristics that stood out in these interactions where we used metaphors; these are also notable from a client-experience point of view. These include

#### *Curiosity*

The act of presenting with metaphors introduced a sense of alertness to the client, and I can endorse that in all the four cases, the metaphors in a way “shook the client” in their perspective of the situation. This happened as they were being exposed to a completely new way of appreciating and absorbing their own reality from a plane of abstraction; and that abstraction was based on facts and evidence. The sense of curiosity led to great amount of interaction and deliberations between both sides. There was *no real truth* in the reporting, but there was *truth that was constructed from the situation that was real*. This sense of curiosity led to further probing in each of the cases. The clients took time to absorb what we had presented and we regrouped at later stages to probe more. Use of metaphors instigated questioning, healthy debate, and brave openness.

#### *Humour*

There was an element of humour that was associated with all the metaphors that we presented. Humour came to surface when different members of the client team

understood the metaphors in different ways initially; this also sparked light-hearted moments at times when the client team members began to crack jokes in the middle of our presentations with their own inferences of our metaphors or by introducing their own metaphors to describe the same situation. Such an atmosphere broke us into laughter on several occasions, and this brought in a sense of comfort in the relationship.

#### *Informality*

Curiosity and humour brought in informality in the client-consultant relationship that is otherwise defined by formal conversation and precise communication. However, it is to be noted that informality did not mean irresponsibility or a lack of our commitment as a client to address the client problem. Through the engagement, our endeavour was effective problem structuring and inclusive problem solving. We maintained the respect and regard that a client is accorded by a consultant at all times. We displayed humility through the process where we were working towards addressing complex business problems in unique situations. I therefore call this “humble informality.”

#### *Trust*

The above factors created a level of trust between the client and us. Curiosity meant exposing one's vulnerability; vulnerability is a core ingredient of creating trust (Coyle, 2018). Humour meant breaking away from one's reservations. Informality meant allowing one's true self to surface. The respective clients began to look at us as trusted advisors who they could rely on also as sounding boards beyond the problem situation we were mandated to address. The relationship grew into a larger one than it was initially meant to be, reflected in continual interactions beyond the life of the projects and repeat business.

In my experience of working on several projects, I could experience a qualitative shift in the engagement where metaphorical references were used. The above perspective of informality and trust can in fact further enable the conceptual lens of holistic flexibility to make it more meaningful and satisfying.

Overall, my experience of using metaphors as a tool for creative consulting was an enriching one at the levels of both problem structuring and client engagement. To a large extent, the experience took away the typical stress associated with consulting often reflected in excessive formality and performance pressure. Metaphorical references introduced a light-hearted tone in our interactions and helped us elevate ourselves from constant scrutiny and discipline. This kind of an experience can contribute towards one's own wellbeing (Cordoba-Pachon, 2019).

Being able to have fun in the process is an essential element of wellbeing. Ultimately, we had fun with metaphors!

Being able to think and communicate with flexibility was a liberating experience for us as consultants. At the same time, this flexibility came with a lot of responsibility to add value to the client—the reason why the relationship existed at the first place.

The aspect of well-being can be an important tenet to be considered in holistic flexibility as an additional consideration for consultants.

## 5.2 | Critique

### 5.2.1 | Note of caution

I would like to highlight a few aspects that one needs to be aware of while using metaphors as tools for management consulting. These aspects are not particularly criticisms, but can be regarded as a note of caution for a consultant.

The primary concern remains that a metaphor does not represent the true description of a reality or a situation; the source and the target domains are not the same. According to the traditional semantic viewpoint, metaphors are a “controversion or deviance of normal language” (Yong, 2014). Yong (2014) highlights Searle’s (1979) thesis that metaphors distort the relation “between word and sentence meaning, on the one hand, and speaker’s meaning or utterance meaning, on the other.” Further, Morgan (2011) says that metaphors only provide partial insights and create inherent conflict in understanding in cases where more than one metaphor is used in describing the same situation where characteristics of one metaphor can be overlaid by over another. Also, the same metaphor can be interpreted differently by different people absorbing the reference given their own values and perspectives. This is a direct implication of the interactive theory of metaphors.

Matteucci (2012) highlights a strong viewpoint against metaphors talking about their distortion of facts and reality to a highly critical level in his words:

Metaphors are bundle packets of “pre-compressed knowledge” from a different context: it’s an “all or nothing” proposition. By smuggling in spurious elements metaphors can seriously mislead by giving us the cuddly feel that we know and understand. A distortion of a distortion seldom yields undistorted understanding.

Use of phrases by Matteucci (2012) such as “smuggling in spurious elements,” “seriously mislead,” and “distortion of a distortion” presents an extreme stand against valid use of metaphors.

Tsoukas (1991) takes a neutral stand and highlights two seemingly different roles of metaphorical references in an organizational context—at one level, metaphors allow bringing in diversity of thinking and more variety to ideate on problem situations; at another level, they can also play a detrimental role in decision making due to their lack of conceptual depth and divergence of interpretations. This perspective may shed some light on Clegg, Kornberger, and Rhodes’s (2004) criticism on management consultancy itself, who advocate that consultants often come in with new language, new interpretations, and new processes that often have varying degrees of information gaps and cultural unfamiliarity that cause nothing but “noise” to the client. The use of metaphors, specifically when we consider the criticisms of distortions and controversions, can act as noise if not handled with maturity and sensitivity.

### 5.2.2 | Understanding both sides of the argument

Although both the stands on metaphors may have their own merit from their respective viewpoints, there is no doubt that metaphors can bring in a great deal of creativity and openness in management consulting. The consultant will need to adopt a mature and sensitive approach in using metaphors as tool for creative consulting. The creative process itself is a journey. For a consultant leveraging creativity in a client mandate, they also have to work within the constraints of client expectations, budgets and timelines, in an organization or a situation that is constantly evolving. As Cordoba-Pachon (2019) says, creators are “being part of complex systems which are in continuous unfolding and co-creation” (p.16). The consultant has to ensure that they are not “seduced” by the creative process that may lead to a diversion from the actual intent of the project. The conceptual lens of holistic flexibility reiterates the importance of delivering on client expectations as a key role for a systems consultant whilst being able to remain holistic in mind and flexible in their intervention. The fluidity metaphorical references bring in through creative tension, and dialogic openness is healthy and responsible, as long as the consultant is cognizant of delivering value to the client and do not make the creative process the end in itself.

I have highlighted several references earlier in this paper that talk about the value that an informed use of

metaphors can bring to management consulting. My case narrations attempt to bring forth my personal experience and benefits of using metaphors in consulting projects. Capozzi, Dye, and Howe (2011) quotes Gregory Berns to say that “to perceive things differently ... we must bombard our brains with things it has never encountered ... Only by forcing our brains to recategorise information and move beyond our habitual thinking patterns can we begin to imagine truly novel alternatives.” Management consultants are brought into a situation because of their novelty in perspectives and outside-in thinking. The use of metaphors can act as a powerful tool to foster “two-way” consulting and enable a process of mutual value creation. Such a process can also establish constructive creativity, healthy engagements, effective problem structuring, and personal well-being as I have highlighted above.

A strategy approach using metaphors can be understood as what Johnson, Scholes, and Whittington (2005) would categorize as “strategy as idea” in their construct of “strategic lenses.” Strategy as an idea emphasizes on innovation and immersiveness in the context. It encourages diversity of thought and adaptiveness to change in the strategy formulation process. As we witnessed in my own use of metaphors in the different client contexts, the process opened up several strategic dimensions for serious consideration and decisions beyond what we were called in for initially. Immersiveness, inclusivity, adaptiveness, and learning became central in the unplanned strategy as idea journey for various aspects of their business.

The other three kinds of strategic lenses that Johnson et al. (2005) talk about are “strategy as design” that emphasizes logical determinism and resource optimization at its core, “strategy as experience” that considers the strategy process as continuous adaptation of past strategies based on experience, and “strategy as discourse” that thrives on establishing legitimacy of decisions often leading to unfair power play.

Holistic flexibility offers a pragmatic stand for management consultants to balance creativity, flexibility and client delivery. Continual learning through experience and expert mentoring can prepare consultants to “mix-&-match” creative tools to make the best out of a problem situation both for the client and for themselves. von Ghyczy (2003) talks about the powerful leverage metaphors can bring to business strategy only if they are not “improperly used [and]... their potential left unrealised.” A consultant may make errors in their creative journey, but they need to continually learn and strive for mutual value creation for sustainable client–consultant relationships. Creative tension, dialogic openness, and humble informality that metaphors can

bring as a tool for creative consulting can go a long way in realizing this vision for the profession.

## 6 | CONCLUSION

In this paper, I presented a systemic appreciation of the use of metaphors in management consulting from the conceptual lens of holistic flexibility. I began by setting the context of management consulting by describing what it is and the nuances involved in a typical consultant profile. Both sides of the coin were presented—one that is exciting, rewarding, and learning-oriented and the other that is stressful, exploitative, and exhausting. Alongside this, I also alluded to the formal and rigid tonality of the client–consultant relationship. I then went on to introduce metaphors and talked about its theory and relevance in management studies. I presented various facets of the use of metaphorical references in management in general and consulting in particular.

I talked about the conceptual lens of holistic flexibility and its key parameters. I explored the relevance of the use of metaphors in the context of holistic flexibility, specifically by their enablement of creative tension, dialogic openness, and humble informality.

With this background, I presented four case narratives from my personal experience of the use of metaphors in consulting—*theatre*, *soil layers*, *human anatomy*, and *parenting*. The case narratives were structured under three heads—*situation*, *metaphor*, and *experience and affect*. This was followed by a reflection on each client experience in the context of holistic flexibility and a critique was presented to understand both sides of the coin.

My experiences and insights also brought to the fore additional learnings for the conceptual model of holistic flexibility itself. My articulation of the aspects of humble informality and well being were not initially proposed in holistic flexibility, but these can greatly benefit the conceptual lens especially for the consultant to work towards espoused responsible outcomes.

Use of metaphors in management consulting is an intensely rewarding experience. A sensitive and well-informed approach in using metaphors can enable the pragmatic stance of holistic flexibility to balance holistic thinking and flexibility to enable the creative journey. Creative tension, dialogic openness, and humble informality that metaphors bring in as a tool for management consulting can go a long way in realizing this vision for the management consulting profession itself.

### ORCID

Rajneesh Chowdhury  <https://orcid.org/0000-0003-0383-760X>

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