

Metaphor as a means to constructively influence behavioural interactions in project teams

**A thesis submitted in fulfilment of the requirements
for the degree of Doctor of Philosophy**

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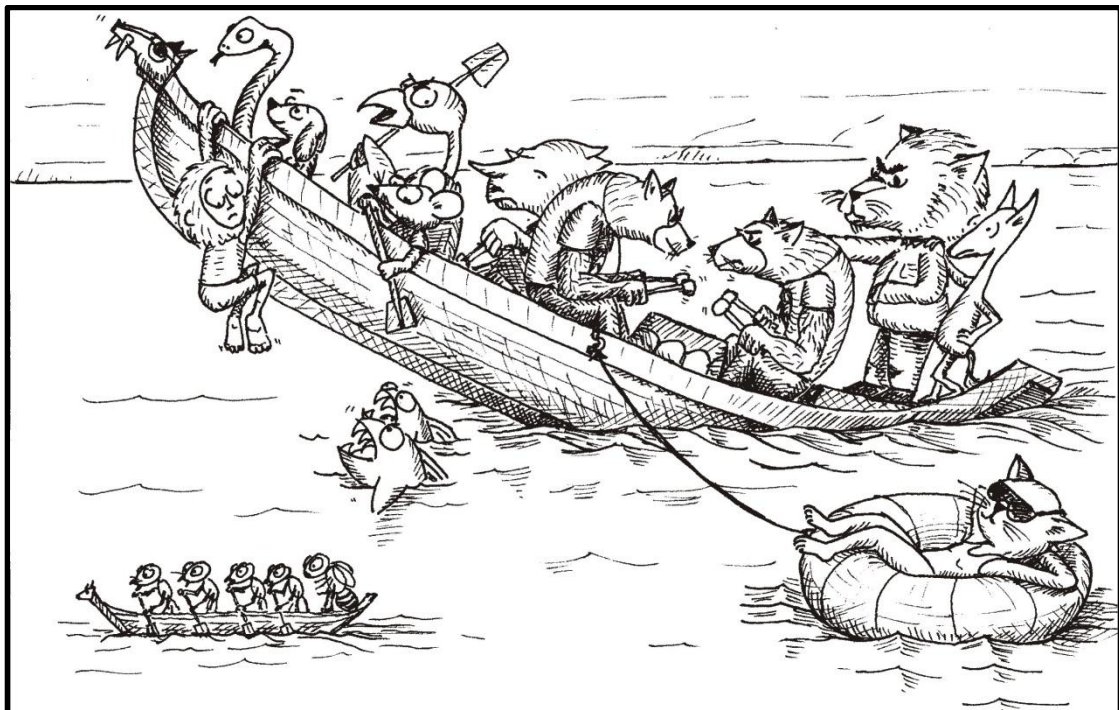
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The Dragon Boat is a metaphoric representation of the behaviours in a project (Shelley 2007)

Declaration

I certify that except where due acknowledgement has been made, the work is that of the author alone. The work has not been submitted previously, in whole or in part, to qualify for any other academic award. The content of the thesis is the result of work which has been carried out since the official commencement date of the approved research program and ethics procedures and guidelines have been approved and followed. Any editorial work, paid or unpaid, carried out by a third party is acknowledged.



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Date: 16 April, 2012

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Abstract

The purpose of this thesis is to explore how metaphor-based interactions can enhance the behavioural interactions in project environments to deliver better outcomes. It documents the processes and findings from an action research program to investigate the impact of combining metaphor, conversation and reflective practice techniques into a new model, the Reflective Performance Cycle (RPC) to stimulate richer and more productive interactions between project team members. The RPC model was used to stimulate constructive dialogue around behaviours within a team context and participants reflected on the impacts this had on their outcomes and performance.

Interactions based on the RPC model were reported by project team members to develop a better understanding of each other and project stakeholders. Their feedback indicated that facilitating such interactions can contribute to greater trust, leveraging more diverse perspectives and building stronger relationships between team members and also with stakeholders. It is proposed that the use of interventions based on this model can assist constructive dialogue when behaviours are aligned with the situations. Application of the model through team interactions highlights the importance of aligning behaviour with the purpose of the conversation in order to optimise impact and achieve desired project outcomes.

The research participants reported the metaphor based interactions to be simple, fun and intuitive enabling them to be added to team activities to create useful conversations. Implementation of these interactions can improve the team dynamics and reduce team tensions. It is suggested that routine use of these techniques in project or team environments could improve performance and increase the probability of successful project outcomes.

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List of abbreviations used in this thesis

GLOBE	Global Leadership and Organizational Behavior Effectiveness program
HBDI	Herrmann Brain Dominance Instrument
KM	Knowledge Management
MBTI	Myer-Briggs Type Indicator
OZAN	Organizational Zoo Ambassador network
PhD	Doctorate of Philosophy
PM	Project Management
RPC	Reflective Performance Cycle

Author publications and presentations

This list shows the publications and presentations generated on this research topic by the author during the research activities (including some that directly supported this research prior to the research beginning in 2009).

Related written publications:

Shelley, AW 2011 Creative metaphor as a tool for stakeholder influence. Chapter in: Bourne, L, Advising Upwards, Helping management to help you. Gower Publishing, Farnham, UK

Shelley, AW 2011 Metaphor as an effective means to stimulate constructive conversations on project culture and performance. European Academy of Management Doctorial Colloquium, Tallinn, Estonia. June.

Shelley, AW 2009 Being a Successful Knowledge Leader. What knowledge practitioners need to know to make a difference. ARK Publishing. UK.

Shelley, AW 2008 Knowledge Frameworks for enhanced performance. A practitioners workbook. Intelligent Answers. Melbourne, Australia.

Walker, DHT, Bourne, LM, and Shelley AW 2008 Influence, Stakeholder Mapping and Visualisation, Construction Management and Economics, 26, 6, 645-658.

Shelley, AW 2007 Knowledge Disrupters in Mergers and Acquisitions. Chapter 3, Next Generation Knowledge Management III, Ed. Jerry Ash ARK Group.

Shelley, AW 2007 The Organizational Zoo, A Survival Guide to Workplace Behavior. Aslan Publishing, Fairfield, Connecticut.

Doctoral Colloquia (specifically on the PhD research)

Shelley, AW 2011 Positively influencing outcomes through metaphor based interactions. Three Minute Thesis competition (RMIT University Finalist).

Shelley, AW 2011 Metaphor as an effective means to stimulate constructive conversations on project culture and performance. European Academy of Management Doctorial Colloquium, Tallinn, Estonia. June

Shelley, AW 2010 Metaphor as an effective means to stimulate constructive conversations on project culture and performance. Asia Pacific Region Conference on Project Management. Doctorial Colloquium, Melbourne, February 24.

Shelley, AW 2009 Optimising project outcomes: leveraging behaviour for impact. PM Ed conference. Perth, July 7.

Behavioural metaphor concept workshops and presentations at other conferences:

2012

PMI Research and Education conference, Limerick, Ireland.
Knowledge Café, London
KM UK, London
KM Middle East, Abu Dhabi

2011

KM Asia, Singapore
KM Australia, Sydney
actKM Conference, Canberra
Knowledge Management Leadership Forum, Melbourne
European Academy of Management, Tallinn Estonia
Edinburgh University
Knowledge Innovation Network UK, Reading UK
Project Management Institute, Melbourne

2010

Project Management World, Orlando FL
Internat. Leadership Association, Boston
Johns Hopkins University, Baltimore
SIKM Leaders Forum, Webinar series
Aust. Institute of Management: Prof Development Forum, Melbourne
Information & KM Society, Singapore
KM Asia, Singapore
Asia Pacific Conference on Project Management, Melbourne

2009

Leading Successful Knowledge Initiatives Master Class, Melbourne
Real Estate Institute Tasmania, Hobart
KM Asia, Singapore
RMIT Business Seminar Series, Melbourne
PM Ed (Project Management Education), Perth
KM for the Advanced Practitioner, Melbourne
Atlanta BDPA, Professional Development Webinar
Knowledge frameworks for enhanced performance, Melbourne
Knowledge & Collaboration in Energy & Resources

2008

World Congress for Project Management, San Diego
Project Risk Symposium, San Diego
SIRFT Industry Knowledge Management Roundtable, Melbourne
Aust. Institute of Management: Managing the Future Series, Melbourne & Hobart
Knowledge Management Power, Seoul

2007

World Congress for Business Analysts, Barcelona
SIRFT Industry Knowledge Management Roundtable, Sydney

KM World and Intranets, San Jose
Aust. Institute of Management: Managing the Future Series, Melbourne

Chapter 1: Introduction

1.1 Chapter Introduction

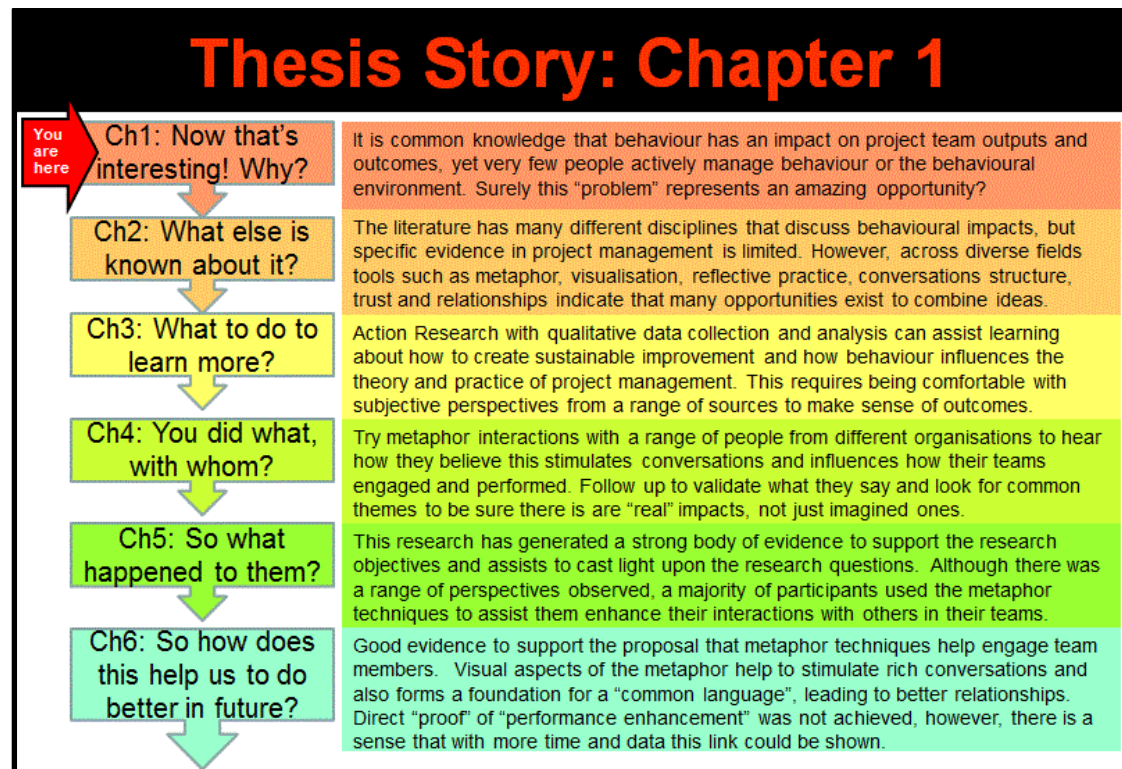


Figure 1.1 The story of this research: a flow through the stages of the research

This first chapter explores the foundations from which this research was developed. It explores WHY the researcher thought it to be important to develop a deeper understanding of the topic of behavioural impacts in projects. Specifically, we explore if and how behaviour influences team dynamics and project outcomes. Knowing this is valuable to not only a project manager or team leader, but also to those they interact with, the wider practice of project management and beyond. This chapter defines the basic premises of the research and defines the research objectives and research questions. It also explains the research approach and details some potential limitations of the research. These provide a robust and relevant framework to guide the literature review conducted in Chapter Two. To assist the reader follow the "story of this thesis", Figure 1.1 provides a "silent guide" to refresh where they are at and where this is taking them to, through the overall journey of this research program.

Behaviour has a significant impact on how people interact with each other, and yet very few organisations are highly effective at proactively managing the behavioural environment. This can be both an awareness issue and also an action issue. As Pfeffer and Sutton (2000) discussed in their insightful book, *The Knowing Doing Gap*, sometimes it is not that we don't know what to do - the key issue is we don't do it. Too often the obvious actions to be implemented are simply not done (or poorly done). Organisations are good at managing process and task, but less successful at managing behavioural interactions. Training and professional development in the field of management (and project management especially) focuses on what can be managed and tangibly measured. Far less attention is given to the intangible social interactions that make a bigger difference and even this is at the conceptual level (rather than detailing what can be done to enhance the situation). This is exactly why this research is necessary – to find simple and initiative ways to act to improve behavioural interactions. Incentives and rewards can make a difference if managed in an effective way, but in my experience (and supported by the literature review), many of the means of influencing behaviour mentioned are deemed poorly done in organisations (especially communication, appraisals and culture management). Many management processes and concepts that have elements of soft skills are introduced and have some effect for a while, such as Total Quality Management and continuous improvement initiatives. However, the reality is these often failed more than they succeeded in the longer term. The researcher believes this is largely because the “new behaviours” introduced in these programs are not permanently embedded into processes to create “new habits” and “ways of working” going forward. The challenges in changing professional work habits and evolving a corporate culture to bring the new ideas into new practices have been discussed previously (Pfeffer & Sutton 2000; Hofstede, Hofstede, & Minkov 2010). The fact remains, behavioural interactions are a significant issue in many organisations, causing high staff turnover and poor engagement levels as direct consequences of poor social management (Amabile & Kramer 2011).

From an organisational perspective, behavioural interactions happen every day that may be “tolerated” rather than controlled or managed. Whilst people in organisations

with a “good culture” enjoy constructive (even fun) interactions, in many others, behaviour is seen as a difficult area to deal with. With increasing globalisation of organisations and flatter hierarchies, there is greater likelihood of cross-culture exchanges that could lead to misunderstandings. Increased awareness of political correctness in professional environments often creates a reluctance to discuss behaviour, which can lead to potentially destructive interactions. This lack of communication can further complicate the situation as there is not a common understanding of what are, and are not, acceptable behaviour standards. This lack of behavioural awareness can also reduce the ability to leverage behaviour in a constructive manner to drive collaboration and reduce conflict. These dangers are magnified in the pressure cooker environment of a complex project, where the people have to interact closely under the added stresses of quality, cost and scope with looming tight timeframes.

However dismal this may sound, for every such problem, there may be an equal and opposite opportunity! History shows many team projects fail to meet their objectives (Chua & Lam 2005; Drummond 1998; Edmondson 2011) and behaviour is part of this problem. The consequences of project failures are huge with millions of dollars lost, delayed delivery of benefits and significant stress and emotional impacts. For example the author worked on one project that cost over one billion Australian dollars that did not deliver the expected outcomes and was delayed for more than a year, largely as a result of poor internal relationships. That project lost alignment with business stakeholders and poor relationships were a significant part of the issue. The Taurus project to implement a new IT system in the London stock exchange is another good (or should that be bad) example, costing over 500 million pounds (in the mid 1990’s) and completely failed to deliver (Drummond 1998). Melbourne MYKI train electronic ticketing system had extreme cost overruns and was deliver late and was not able to cope with the peak traffic capacity (Murphy 2011). This research seeks to find ways to turn these problems into opportunities by exploring: *“If a simple and intuitive way could be developed to leverage the positive aspects of behavioural interactions and mitigate against negative behavioural interactions”*. If this was achieved through the research, it could lead to significant benefits to individuals, teams and organisations. This research assesses metaphor as one potential creative

method to stimulating positive conversations about behaviour. It investigates if creative metaphor conversations can influence participants to engage with each other and stakeholders in a more constructive way to enhance achievement of desired outcomes.

Part of the challenge in this research is that although we all intuitively know what behaviour is, finding a suitable general definition is not simple. Behaviour is a complex and interdependent factor that is difficult to define specifically as it has used widely in the literature in many different fields from material science to human medicine to social research. Part of the problem is that behaviour is interpreted differently by different people - not just lay people, even professionals in related fields, as is demonstrated in the quotes below. The following two extracts from the Penguin Dictionary of Psychology (Reber et al 2009) and the discussion that follows help to clarify the intended use of the term behaviour in this research.

“There has been a long (and agonising) tradition of attempting to put some set of coherent limits on the boundaries of denotation of this term. Doubtless, much of this derives from a well meant but basically hopeless attempt to define psychology as ‘the science of behaviour’, a definitional gesture that has resulted in a fascinating kind of futility. The problem has been that as the range of phenomena included within the domain of psychology has increased there has been a need to expand the boundaries of what can be legitimately called behaviour.”

“What we have here is a conflict between, on one hand the deep felt need to keep psychology objective and precise and, on the other the desire to extend its domains into cognition and neurophysiology. The causality has been, of course, the term behaviour itself. It is used today in a manner that reflects the theoretical point of view of its user and can no longer be said to have a clear denotative domain, although this is not necessarily a bad thing.”

A unique aspect of this work is the metaphor allows the many behaviours of individual to be explored as pieces of the overall behavioural environment jigsaw. Behaviours are displayed by individuals when they are alone (which usually have no

impact on others) and also when they are in the presence of others (which may or may not have a significant impact on others). The behavioural characteristics of a team environment are dependent on WHICH behaviours are displayed by WHOM, WHERE they fit into the social fabric of the team and HOW the team accept or reject these behaviours. So, the behavioural outcomes are interdependent and complex. This complexity is exacerbated by the confusion caused because (some) people (choose to) “play roles” and do not necessarily show their real intent. This is further complicated by the fact that people know others play roles and therefore try to interpret why they are behaving as they do, leading to filtered perception of what the motivation or “real meaning” is. Interpretation of others intent, based on their overt behaviour, is fraught with danger and the very reason open constructive discussions about behaviour and desired outcomes are productive. This research explores how it is possible to stimulate such positive interactions to deliberately clarify and enhance the behavioural environment in project environments.

Dictionary.com defines a range of definitions for behaviour including the following:

- *Manner of behaving or acting*
- *Psychology, Animal Behaviour*
 - *observable activity in a human or animal*
 - *the aggregate of responses to internal and external stimuli*
 - *a stereotyped, species-specific activity, as a courtship dance or startle reflex.*
 - *the action or reaction of any material under given circumstances*

These definitions are complemented by a range of other sources from psychology, medical and social perspectives which add to the complexity of the use of the term behaviour. In the introductory chapter to their popular tertiary text book, *Discovering Psychology*, Hockenbury and Hockenbury (2011, pp. 14-15) discuss fourteen different speciality areas of psychology and how the approach to understanding behaviour differs in these. They also detail eight “perspectives of psychology” (p. 10) of which several are relevant to this research approach, especially those named psychodynamic, behavioural, humanistic, positive, cognitive and cross cultural. Whilst this research is not intended to be a study of the theories behind these psychological areas, it is informed by them.

One key difference between much of the psychology research and this research is this study is focused on positive behavioural modification to enhance outcomes, rather than focusing around adjusting what may be considered therapies to adjust clinical conditions related to behaviour. In this respect, techniques applied in this research are more aligned with “interpersonal therapy” (Hockenbury and Hockenbury 2011, p. 584), in which the focus is on current relationships rather than past and the aim is to enhance interactions rather than treat a “condition”. Done from a “humanistic perspective” Hockenbury and Hockenbury (2011, p. 585), this work “emphasises human potential, self-awareness and freedom of choice” and adopts the principle that “If people are raised in a genuinely accepting atmosphere and given freedom to make choices, they will develop healthy self-concepts and strive to fulfil their unique potential as human beings.” Throughout this research there is a strong emphasis on optimising the performance of teams through deliberate and informed decisions about what behaviours to apply within specific project contexts.

The adage “*you can lead a horse to water, but you can’t make it drink*” is also a significant challenge to the outcomes of this research. This is not a new issue, as Johann Wolfgang von Goethe stated in the nineteenth century, “*Knowing is not enough; we must apply. Willing is not enough; we must do.*” (Brainyquote.com 2012) Creating awareness of the desired behaviours does not automatically generate the desired outcomes. Getting people to behave the way they “should” is as much a challenge as getting a group of people to agree on what the optimal behavioural approach is in the first place. Action research was chosen as the approach for this research as it provides the opportunity to influence the research subjects to apply the behaviours they planned and then reflect on what impact this makes. To achieve the aims of this research such interactions need to be applied and interpreted and understand the motivations, and barriers to application. Literature around the Theory of Planned Behaviour (TPB) helps to inform this approach. TPB literature (Ajzen 1991, Armitage & Conner, 2001) and also works on the dynamics of action understanding (Vallacher & Kaufman 1996), discuss the complexities of converting thinking and decision-making processes from intent into plans and action and was also considered in research design.

1.2 Rationale, prior experiences and context

To help establish context, the researcher spent almost 20 years working in projects in large organisations. During this time he observed many apparently “good ideas” fail to deliver their full potential. Whilst in practice one often observes examples of sub-optimal performance (if not outright failure) resulting from a range of “rational” aspects of project management, these do not explain all failures. The author has personally observed many instances where the softer aspects of team environments have been a more significant cause of sub-optimal performance than the rational factors, a view also supported by a range of researchers (Andersen 2008; Morris & Pinto 2004; Müller & Turner 2010; Smith 2007; Weick & Sutcliffe 2011; Winter et al. 2006; Winter & Szczepanek 2009). Examples of the causes of sub-optimal performance include: poor ideas not being culled early enough, insufficient skills or resources being allocated, changing priorities, poor leader or management decision-making, inexperienced team members, unforeseen external factors, lack of process, inconsistent or poorly defined scope. Such factors align with what a range of factors reported to be “early warning signs” of issues in complex projects (Klakegg et al. 2010). Klakegg et al found political and behavioural aspects of projects had an impact in several case studies. This research explores if, and how, behaviour influences these softer factors and if active behavioural interventions based on metaphor can help to actively manage interactions in projects to generate improved outcomes.

In the experiences of the researcher’s career, the most commonly observed successful way to deal with issues was to get a group of involved and experienced people together and discuss potential options for resolution. Anecdotally, the more diverse the views heard and the more open the environment these ideas were being shared in and developed, the more mature the set of potential solutions became. Furthermore, creative techniques such as brainstorming and parallel thinking (de Bono 1985) that controlled the nature of the conversation seemed to generate more robust solutions. As a result of these observations, the researcher read very widely to find creative methods to facilitate an environment that engaged team members in active dialogue

that aligned with the situation being dealt with. The nature of a divergent conversation (when generating a number of options) is very different to a convergent decision-making discussion (such as a risk assessment was being done). It became clear that the facilitator of the conversations needed to set an environment which was conducive to the purpose of the conversation.

The conversational approach has also been strongly supported by Winter and Szczepanek (2009) who use an action research approach and multiple “images of projects” to understand projects at a richer level. They combined theory from a range of disciplines to establish a pragmatic action based approach to research in project environments. Foundation work used in this research included De Bono's lateral thinking (de Bono 1971, 1985), Claxton's cognition for decision-making (Claxton 1997), Morgan's metaphors for organisations (Morgan 2006), Checkland's systems thinking (Checkland 1981; Checkland & Poulter 2006; Checkland & Scholes 1999) and Schön's reflective practice (Schön 1995). The resulting approach involved using conversation to stimulate a multi-perspective view of projects. Projects can be viewed as both a learning environment and as generators of sustainable change and new knowledge (Koskinen, Pihlanto & Vanharanta 2003). Knowledge sharing within team environments has been shown to be influenced by leadership and behavioural interactions (Xue, Bradley & Liang 2011). Example statements to highlight how conversation helps to achieve this are shown below (Winter, Mark & Szczepanek 2009):

p. 8. *"Also, whatever images are used, they are not recipes or prescriptions, they are prompts for seeing, thinking and talking about projects in real situations."*

p. 9. *"...the people in the situations are consciously thinking from multiple perspectives, rather than just relying on experience and intuition; in other words, as well as experience they are deliberately using different images and frameworks to help think and talk about their particular projects."*

p. 211 *"Since they all know the perspectives, they use the images framework as a common language for thinking and talking together about projects."*

p. 214 *"...a project team can jointly observe, react to and guide their own thinking process and its content at the same time, by using the images framework as a common language."*

The significant “rethinking project management” study commissioned by UK’s Engineering and Physical Sciences Research Council (Maylor 2006), involved both academics and practitioners from a wide network. Together they challenged what is important to enhance the performance of the emerging discipline of project management and generated insights that highlighted (amongst other things) the importance of social interaction in complex projects. As a part of this study Winter *et al* (2006) recommended five key directional changes for the future development of project management, three of which (complexity, projects as social interactions and reflective practice) have direct implications for how project participants converse and interact with each other to secure desired outcomes more effectively. The fact that this research was conducted through a series of meetings where researchers and practitioners could converse about projects using a sense-making approach, reinforces the importance of interactive conversation to develop knowledge and create new opportunities in the field.

Independently and parallel to these observations, reading and learning opportunities, the researcher began to experiment with some creative methods to build relationships and trust in team environments. A wide range of creative “ice-breakers” and team dynamics workshop activities were trialled in a wide range of teams from just a few people through to very large international teams that were not co-located. Whilst there were many activities that engaged the team in active dialogue, those that were engaging/fun and based on metaphor were found to consistently deliver desired outcomes. Over time, these were further developed into a range of interventions that provide more sophisticated and generated better outcomes for the participants. There also provided a more detailed understanding and greater longevity of impact than earlier simpler activities. After several years of development across a range of organisations, one metaphor concept based on animals representing behaviours consistently engaged workshop participants around a range of topics to provide

greater awareness of behaviours and their impacts. This set of metaphors was developed further by the researcher between 2000 and 2006 that highlighted the relationships between individual behaviours as well as the wider behavioural environment. Eventually, it was published as *The Organizational Zoo* (Shelley 2007).

The use of *The Organizational Zoo* (Shelley 2007) in a small number of organisations to support a range of activities from ice breakers to more involved interventions to develop teamwork and leadership generated confidence that metaphor based interventions may have greater potential to leverage behavioural interactions in a more significant manner. Whilst the anecdotal evidence was growing, there was a need for a more robust academic study to determine if and how effective metaphor methods may be used in other situations and what impact they may have on behavioural outcomes.

It is important to note here that the purpose of this research was not to “prove” the effectiveness of the Organizational Zoo model. The purpose was to use this specific model as an example of a well-constructed metaphor to demonstrate how metaphors can be used to stimulate rich interactions in a project environment and to measure the impact such interactions can have. This particular model was used because of the familiarity the researcher had with it and because it was the most comprehensive one available which assessed impacts of individual behaviours, rather than what most do which is to assess the person as a whole.

So after twenty-five years of practice and informal observation of the impact of behaviour on outcomes, the opportunity to engage in academic research was a natural “next step” in the journey of understanding and knowledge development. The richness of the academic pursuit to complement the experiential learning has been significantly deeper as a result of the prior work and life experiences. The PhD experience is as Etherington (2004 p. 15) described so eloquently a process of “becoming” a reflexive researcher to understand at a deeper and deeper level:

“...the process of becoming - it implies movement, agency and continuity, rather than striving to reach a state at which we have 'become'. It is based on the notion that we are constantly changing and developing our identities, and that they are never fixed.”

1.3 Problem (Opportunity) statement

This research takes the perspective that, for every problem there is an equal and opposite opportunity. Whilst research is traditionally considered to be “problem solving”, the reality is (at least in the beginning of much action research) sometimes we don’t know what the exact problem is (or perhaps even if one exists). The journey of discovery this thesis represents is one of continuous cycles of learning and actions that both contribute to our understanding of “the problem” and that helps develop our capability to deal with other “problems” as they arise. It is literally an iterative cycle of discovering more assists us to understand what more there is to discover that we are unable to consider until we learnt from the first cycle.

Within this context, the literature clearly shows that many large projects fail to meet their objectives and some are outright failures (Bourne & Walker 2005; Bryde 2003; Chua & Lam 2005; Müller & Turner 2010; Ojiako, Johansen & Greenwood 2008). These failures cause significant financial losses and also result in negative emotional impacts for many people involved. It is also well known that behavioural interactions in project environments can have a significant impact on the performance of projects and their ability to achieve their desired outcomes (Müller & Turner 2010; Ojiako, Johansen & Greenwood 2008).

The problem is how to manage behavioural interactions in projects in such a way as to minimise damage and increase benefits, whilst creating a professional environment in which people are happy to participate.

Restating this in a more basic manner, but as an opportunity this reads:

What can project leaders, team members and stakeholders do from a behavioural perspective to increase the chances of success, provide a positive work environment and enhance the probability of achieving (or exceeding) project outcomes and outputs.

This research attempts to provide insights into creative and enjoyable techniques that can achieve this. Generally people respond well to interactive activities that are inclusive and open to incorporate ideas, so creative methods of engagement and knowledge exchange were sought. The literature has examples of the use of metaphor as a creative way to exchange rich and complex information. So the research idea was to explore metaphor as a potential tool to enhance project team members' understanding of the impact of behavioural interactions on outcomes.

If a simple, intuitive approach to enhancing behavioural interactions in projects could be developed and cost effectively incorporated into project management methods, there are huge potential benefits, both tangible and intangible.

1.4 Research objectives

The primary proposition of the research was to determine if *metaphor based interventions, designed to engage project team members in constructive dialogue around behaviour and relationships, can enhance project performance and outcomes*. If this proposition could be supported by evidence it has significant value to the field of project management, because it is widely recognised that behaviour does impact project performance (Andersen 2008; Cervone 2008; Leblanc 2004; Morris & Pinto 2004; Sniehotta 2009; Whitty 2010; Xue, Bradley & Liang 2011). However, there is not clear understanding of specific actions to describe how to proactively manage the behavioural environment in projects and those that may exist are not widely applied in practice.

The research objectives were to:

1. Identify a suitable (intuitive) metaphor-based technique that could be used as a model for this behavioural research
2. Develop a series of interventions based on this metaphor and assess the impact it has on the team relationships and their relationships with their stakeholders
3. Apply these interventions in real project situations across four different organisations as part of an action research program to answer the research question highlighted in Section 1.5

1.5 Research questions

Attempting to gain an understanding of how metaphor might assist to develop the behavioural interactions between project team members in emergent and complex situations is a difficult task. One needs to reflect on what the significant questions to ask in advance might be, which may or may not be (with hindsight) the most compelling explorations of the potential of the metaphor with hindsight after conducting the research.

After considerable reading and drawing on personal insights of several experienced project managers the following three were chosen as the focus of the research. As is discussed in Chapters Five and Six, other unexpected aspects emerged through the research that proved to be equally insightful and these are discussed in greater detail in those chapters. If one is to accept the philosophies of an unpredictable future and that we create the future through our interactions, this comment will not present a surprise. For further discussion of this point, refer to section 3.2 describing a subjectivist approach to research.

1. How is the stakeholder engagement process enhanced through the use of metaphor tools, and if so how?
2. How can project team members influence outcomes more effectively by better targeting stakeholder behaviours, and if so how?
3. How does the team operate more effectively by using metaphor to help align roles or tasks to team members, and if so how?

These questions provide something specific to investigate within the scope of a PhD project. As the research progressed it became obvious that many other aspects of behavioural impacts on team dynamics and performance could be investigated, but these could not be adequately covered within the timeframe of a PhD program. These are however discussed in the further research section.

1.6 Research Approach and Limitations

There are always challenges in balancing robustness of data and relevance when dealing with the subjective aspects of research like behaviour and human relationships. It is extremely difficult to “measure” behaviour and its impact, as all evidence in such cases is a perception of the participants and therefore insights gained are through filters rather than being completely objective. However, this accurately represents the reality of teams, in that people interact with each other in subjective ways and make decisions based on their own perceptions of what is happening.

Qualitative research, such as this study is an exercise in reflexivity, in that the researcher inevitably plays a significant role in the creation of the data and influences how it is interpreted (Richards 2009). This feature of such work is criticised by positivist researchers, but is considered a strength by both critical and interpretivist researchers as it reflects the fact that humans interpret the world around them through filters to perceive that they see as “reality”. To highlight this point, Richards (2009, p. 49) stated “... *reflect constantly on how these data are made and the part you play in them... qualitative data are not collected, but made collaboratively by the researcher and the researched*”. It is essential for the reader to understand that this subjective position does affect the interactions between the research participants and also how they interpret what is happening and what they learn as a participant in it. It also impacts how the researcher designs the research interventions and how they interpret what happened. Interpretivist researchers accept that this is the reality that people engage in on a daily basis and the mechanism through which research is most likely to influence others- thereby the optimal path towards making a difference.

An interpretivist approach is taken using Action Research methodology because of the subjective nature of the topic and this is fully justified in Chapter Three. This philosophical position is important to understand when reading and interpreting the research, as it highlights the foundations on which it was conceived, designed, implemented and interpreted. Other philosophical positions would have led to different design and intervention, as has been explained in Chapter Three. The

approach also highlights a number of assumptions and limitations that are highlighted below.

Potential limitation 1: Interpretivism (see section 3.2) accepts that there is no “absolute objective truth”, which may or may not be a position accepted by the reader. For interpretivists “reality” is a subjective state which manifests itself differently for different people (being subjectively formed as a perspective influenced through their values and prior experiences). The outcome of this is, the researcher has accepted that each team member filters what they observe and feel, through their own values and biases. Each participant determines what happened and why from a range of inputs, both conscious and subconsciously (including what they observe, and don’t observe). For this reason, the observations of the research subjects comprise the main body of evidence rather than the observations of the researcher and a significant number of people were involved from different organisations and cultures. Using the observations of the research participants rather than “interpreted” data from the researcher, also assists to limit the potential bias of the researcher as well (see below).

Potential limitation 2: The Hawthorne effect is variously defined as the propensity for people to act differently when they know they are being observed in an experimental situation (Olson et al. 2004). Olson *et al* discussed these limitations including that participants and researchers may attribute causality of effects that are more a result of the observation than the cause/stimulant itself. In this research, this translates to the possibility that the feedback from the research participants could be influenced by their belief that the metaphor caused them to act differently, when in fact any perceived change was simply as a result of being involved and observed. Several points of research design were created to mitigate against these possibilities: *Firstly*, research participants were asked to implement their own interventions outside of research workshops and provide direct evidence of impacts of behavioural changes they made as a result of using the metaphor techniques. *Secondly*, research participants were asked to categorise the outcomes of their interventions and reflect on their impact themselves, rather than the researcher assess the impact they had.

Thirdly, researcher observations were validated through focus groups with the research participants with each organisation.

Potential limitation 3: The potential bias of the researcher because of his prior experiences and as the initial creator of the Organizational Zoo metaphor. This element needs direct discussion as in action research the objectives of the researcher are to both educate the participants and also to gather research data to generate new learning and actions. Just as the research participants' observations are influenced by their own experiences, so are those noticed and interpreted by the researcher. That stated, the methodology and research design have compensated for this bias, through validation steps where observations by the research participants are collated by the researcher and challenged by the group and vice versa (see validation focus group activity in methodology). As stated earlier in this chapter, the research purpose was to assess metaphor itself, not specifically the Organizational Zoo metaphor, which was chosen as a robust example known in detail by the researcher. This particular metaphor framework was selected there was insufficient time to develop a deep knowledge and experience of other metaphors and also there is a scarcity of comprehensive sets of metaphors to represent individual behaviours. If a less familiar or less comprehensive metaphor was chosen, the researcher would have to consider researcher familiarity and robustness of the metaphor itself as another complication. This further complexity is beyond the scope of a single PhD program.

A similar potential bias argument can be made for the data generated by the independent practitioners. These participants were self-selecting, and therefore are more inclined to see the positive aspects of the Zoo metaphor techniques than randomly selected practitioners. The challenge here is the practitioners needed to implement an intervention and then reflect on the outcomes of that. For this to be possible, they needed to be familiar with the technique and competent to deliver it. So, in reality it was not possible for a randomly selected facilitator to participate anyway and the data from these sources was included to highlight the difference in what an experienced facilitator could achieve with the techniques compared to uninitiated person in project environments.

Potential limitation 4: This research only considered research published in English. There is little doubt that research papers in similar areas exist in other languages which may have brought different perspectives to light. However, within the timeframes and budget of this research, inclusion of alternate language research was not possible. It is also likely that there is other relevant English literature that has not been discovered in the course of this work. In times of massive quantities of information generation, it is simply not possible to include all literature, although every effort has been made to include as much directly relevant research as possible.

That said, many people from a range of cultures have been exposed to the metaphors used in this research and there is significant opportunity to leverage other languages and cultures for this research (refer to discussion and ideas for further research on multicultural perceptions of these metaphors in section 6.7).

1.7 Literature foundations for research approach

A wide range of literature informed the development of this thesis, some of which are directly referenced in this section and others that are discussed in greater depth in the literature review (Chapter Two). To assist the readers of this work, Table 1.1 was created to highlight the major themes surrounding the wider body of the research which helped to shape it into the final focus. Such a range of fields is appropriate to reflect the complexity of modern projects and business environments and the considerations required to engage in appropriate sense-making and decision-making to effectively manage them (Andersen et al. 2006; Müller & Turner 2010; Snowden & Boone 2007; Winter, et al. 2006).

The way in which each of the literature themes has influenced the thinking in this thesis has been described in Table 1.1 to provide the reader with greater insights as to why the researcher considered these were important. Within the context of this research there are interdependencies between each of these, despite the fact they are for different fields. For example, the purpose of the research is to understand the impact behaviour has on team dynamics. This is brought about by reflective practice in order to engage in sensemaking activities, including conversation. The situations

being discussed are complex, so a soft systems (holistic) approach provides insights into the interdependencies between the elements and behavioural profilers help to understand some of those elements in isolation. Collectively these provide many perspectives of the situation, and therefore generate richer insights into understanding the behavioural environment. Specific definitions of these terms can be derived from the key references provided in Table 1.1.

Table 1.1 Summary of key literature areas informing research approach

Literature Theme	Key Influencers	Rationale brief
Action research & Action learning	McNiff & Whitehead (2000) Mumford (2001) Reason & Bradbury (2001) Zuber-Skerrit (2002) Coghlan & Brannick (2010) Dick, Stringer & Huxam (2009) Sankaran (2009) McIntosh (2010)	Action research and learning is the primary approach used in the research because it is the most appropriate in this type of environment where a new concept is being introduced to stimulate sustainable positive change and develop capabilities.
Reflective practice	Schön (1995) Dick (1999) McNiff & Whitehead (2000) Winter & Szczepanek (2009) McIntosh (2010) Steinfort (2010) Amabile & Kramer (2011)	Reflective practice and action research are interdependent aspects of applied learning environments. The effectiveness of the learning and likelihood of retention are increased if reflection is applied, especially in cycles of learning such as action research.
Metaphor	Lakoff & Johnson (1980) Jung (1991) Hollis (2004) Gannon (2010) Grisham (2006) Morgan (2006) Shelley (2007) Andreissen & Gubbins (2009) Winter & Szczepanek (2009)	Metaphor is a central theme to this research and the mechanism through which the conversations are facilitated. Researchers from diverse fields have highlighted the power of metaphor to understand unfamiliar contexts and help convey complex meaning, which was the purpose of the metaphor in this research – to simplify understanding of behavioural environments without trivialising its importance and impact.

Literature Theme	Key Influencers	Rationale brief
Conversation for knowledge and understanding	Ogborn & Johnson (1984) Bohm (1985) Zeldin (2000) Schuurman & Veermans (2001) Patterson, Grenny, McMillian & Switzler (2002) Manning (2002)	Conversation is a critical mechanism for people to exchange knowledge and build common understanding, especially in team environments. The nature, timing and tone of a conversation impacts the perceptions drawn by the participants and guides their understanding of the concepts discussed as well as the actions they are motivated to take as a result.
Sense-making	Polanyi & Grene (1969) Handy (1995) Hill & Lavenhagen (1995) Polanyi (1998) Snowden (2002) Weick (1995) Weick (2007)	Sensemaking is a process through which people come to understand complex situations. This process enables people to engage with unfamiliar or unexpected information and situations and facilitate the emergence of meaning and insights. In this research the participants interact to find new meaning to behavioural interactions and new ways to make sense of them.
Team roles, stakeholders and team dynamics	Leonard & Straus (1997) Walker, Bourne & Shelley (2008) Belbin (2010) Lovallo & Sibony (2010) Edmondson (2011)	The roles people take (or avoid) responsibility for in teams has a significant impact on their own performance as well as the performance of those around them. It also impacts how they interact with others in the team environment. Understanding the nature of the roles in team environments helps to consider which behaviours are appropriate to achieve the desired outcomes and relationships between team members (and what happens when these go wrong).

Literature Theme	Key Influencers	Rationale brief
Project management as an evolving discipline with respect to behavioural development and projects as lifelong learning vehicles	Slevin & Pinto (2004) Chua & Lam (2005) Davey & Tatnell (2007) Andersen (2008) Cervone (2008) Hodgson & Cicmil (2008) Andersen, Dysvik & Vaagaasar (2009) Müller & Turner (2010)	There have been a number of challenges to the task orientation approach applied in traditional project management approaches, highlighting a need to develop more soft skills and capabilities. This research is motivated by this trend as it seeks to evolve interventions that will enable project managers do this more effectively and leverage the opportunities a project environment offers to build the “soft” capabilities of teams and lead to enhanced outcomes and a more professional discipline.
Visualisation, rich pictures and imagery	Avison, Golder & Shah (1992) Arnheim (2004a, 2004b) Checkland & Poulter (2006) Roam (2008) Steinfort (2010) Sibbet (2010) Walker & Steinfort (2011) Durant Law (2012)	Visualisation, through rich pictures and other imagery, assists individuals and teams to express a deeper level of knowledge than words alone. In this research images are used as a stimulant of conversations between people to assist them to draw upon patterns and understanding they already know to help them explore unfamiliar situations.
Behavioural profiling	Bayne (1995) MBTI de Boer (2001) HBDI Hogan & Holland (2003) HPI Shelley (2007) Zoo Metaphor Belbin (2010) Team roles	Understanding the behavioural preferences of people involved in projects assists in the understanding of how they interact and ultimately on the performance of the team. In some aspects The Organizational Zoo metaphor allows participants to profile the behavioural preferences of stakeholders and of the team collectively. This enables conversations around how behaviours impacts the team and also enables sharing of different perspectives on behaviour.

Literature Theme	Key Influencers	Rationale brief
Soft systems	Checkland (1981) Checkland & Poulter (1999) Checkland & Scholes (2006)	Soft systems methods encourage holistic thinking to understand the interdependencies between each of the influencing factors in the “system”. This approach to understanding helps to see how behaviours are an integral part of how teams interact and perform.

1.8 Thesis structure

The overall structure of this thesis is displayed in Figure 1.1 (which is repeated at the beginning of each chapter as a visual reminder for the reader where they are in the overall story). The structure reflects the learning journey of the researcher which was best represented as a series of questions on an emergent journey. As each step was taken the course was slightly reset to embed the learning from the previous stages. For example, the researcher’s previous experiences and readings informed him as to what might be an interesting research and learning experience, that could also contribute to the body of knowledge on the influence of behaviour on the practice of project management (Chapter One). Chapter Two naturally flowed from there as a quest to find out what is already known, so that the learning journey could leverage prior knowledge and also the insights of prior researchers.

These insights were built into the design plan documented in Chapter Three that would shed light in what else could be learnt through a participatory action research and engaging with people in interactions using metaphor techniques. Having engaged with the research subjects, Chapter 4 introduces the organisations and contexts that were engaged to work with through the research and Chapter Five captures what was learned by both the researcher and the research subjects alike and how they could, together, make sense of their perspectives and the themes emerging from their experiential feedback.

Finally, Chapter Six reflects on the whole process and builds an argument from the gathered evidence that metaphor is in fact a useful tool that could be used widely in the project and team environments to create greater awareness of behavioural impacts and build better relationships between team members. Further research is highlighted as to how these ideas can be developed further to show how changes brought about by metaphor interventions could be directly linked to project performance and better achievement of desired outcomes.

One of the features of this thesis is a deliberate attempt to restrict it to the most relevant and highest quality content. The reason for this is, too often theses are much longer than they need to be and include discussions of less relevant tangent points. Many theses contain excessive reinforcement of some points and too many references that say essentially the same thing, in the hope that this makes the argument stronger. In my humble opinion, this reduces the impact of the writer's own specific piece of research as it dilutes out what their actual contribution to the body of knowledge is. Researchers are best assessed primarily on their own work and secondarily on how they integrate this to the greater body of relevant knowledge. That is not to suggest that prior research should not be used as a foundation for new research as this is clearly not valid, it is just to reinforce that this should be of lower priority than the new piece (as it is this that adds the new contribution and ultimately what reflects the capabilities of the researcher). This approach acknowledges that when discussing prior research, it is best to focus on the most relevant and highest quality to keep the argument focused and flowing. There is no doubt this thesis could have acknowledged many more references and discussed each point at greater length, but (in the authors opinion) this would not have added much value to the argument. There seems to be little point in regurgitating large sections of other's arguments, when they have expressed their own points so eloquently. This is especially true when one can simply reference their original document within the context of this thesis. Also, there seems little point in adding several additional references to support a point, when one or two key recent pieces have included much of the earlier literature, thereby enabling discovery through their cross references.

This approach achieves several benefits for the reader of this thesis:

1. It appropriately acknowledges the work which has informed and influenced this argument (and in some cases which challenges this thinking)
2. It enables the reader to focus on the best and most recent references for a specific point rather than have to find several other less important sources
3. It maintains the focus and flow of what this research has found without distracting the reader by introducing too many “sideline” points
4. It keeps the thesis to a readable length, thereby optimising the chances of it actually being used in future research and adding to the body of knowledge (as opposed to just being another dust collecting thesis on a library shelf)

The point of brevity to achieve quality is not new. The quote, *"I didn't have time to write a short letter, so I've written a long one instead."* has been attributed to a range of luminaries including, Blaise Pascal, Mark Twain, and Voltaire. The fact that many people have been acknowledged to have said the same or similar things also highlights we are often unsure where the true origins of ideas come from (or whether they genuinely arise independently or as a result of conversations seeding ideas in others). Adding all three as a source does not strengthen the point being made, unless you are of the belief that if many people say something, it must be true - a very dangerous path to tread. Social proof has very often been wrong as Galileo found out the hard way after being convicted of blasphemy after postulating that the Earth travels around the sun. Equally, one should not be overly influenced just because “someone famous” makes a point as even great people can be found to be mistaken. For these reasons, this thesis follows a focused and “relevant” flow using a carefully reflected on compilation of supporting references to maintain a focused argument.

1.9 Chapter Summary

This chapter introduces the reader to the diversity of disciplines which influenced the thinking of the researcher in embarking on this work and highlights the experience of the researcher as a significant influencing factor in determining the direction and focus, in conjunction with colleagues and the research supervisor. This chapter defines the foundation from which this research was developed, the research objectives and research questions and explains the research approach. It highlights

why this research will create value to project management theory and practice and beyond as well as why the thesis takes a focused view on the new aspects of this research. These inform the directions taken in Chapter Two, which explores these ideas and concepts in a much greater detail through a wide and deep literature review of many topics related to these.

Figure 1.2 Word cloud* for Chapter 1, visually demonstrating main themes

In this chapter the main themes are: research, metaphor, behaviour, projects, interactions, researcher, teams and outcomes. The word cloud figure clearly highlights why these as the focus topics of the literature review and ultimately the foundations of the methods used in the research design. It also highlights the

complexity of the topic, with many other interacting factors appearing as important aspects of the dialogue, represented by the remaining words in the cloud.

Chapter 2: Literature Review

2.1 Chapter Introduction

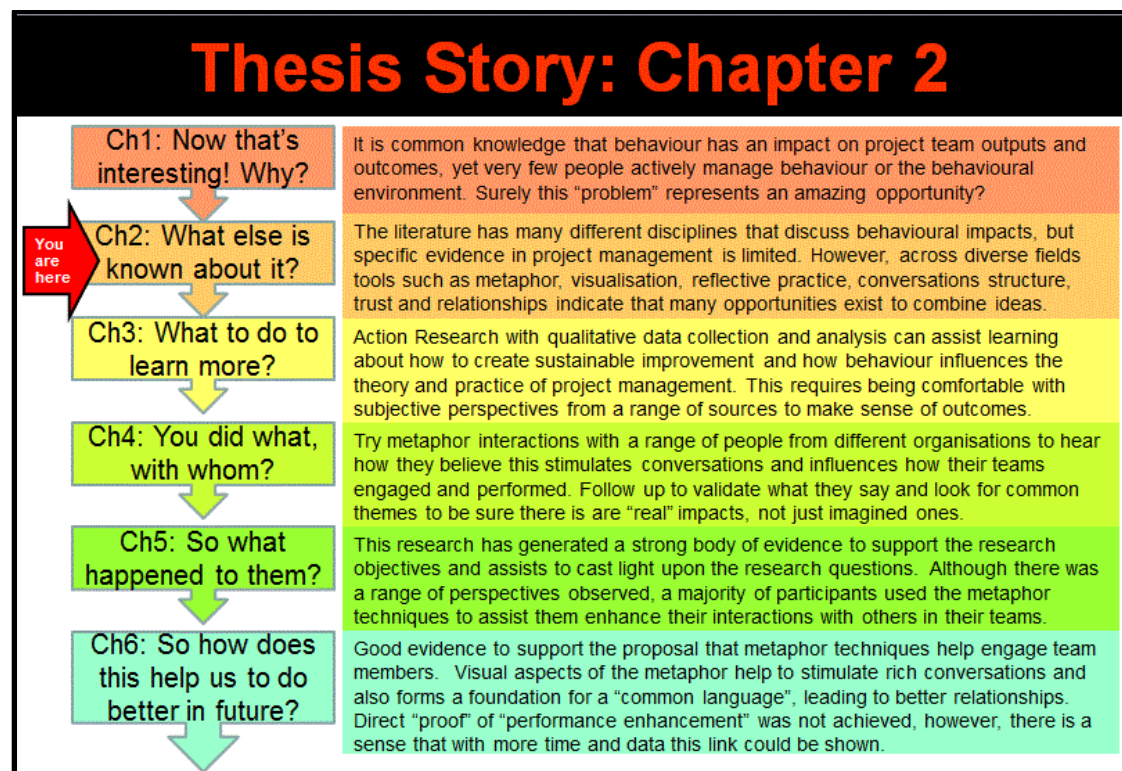


Figure 2.1 The story of this research: a flow through the stages of the research

This chapter builds for the foundations developed in Chapter One to delve into what is already known in the areas of how metaphor may be able to be used to create a better understanding of the behavioural environment and how it impacts team interactions. It explores literature sources to determine what is already known about behaviour impacts on project outcomes and team dynamics ideas and to highlight gaps in the project management theory and practice where these exist. This review of the literature guides the research design and methodology choices made in Chapter Three, such that existing knowledge can be leveraged to optimise new learning and knowledge development.

This review of research draws from a wide range of disciplines to bring together an interdisciplinary perspective of how behaviour can be more productively leveraged in team environments. The approach has been influenced by the recognition that human

environments are complex (MacGillivray 2006; Snowden & Boone 2007; Vidal & Marle 2008) and unpredictable (Weick & Sutcliffe 2011) and as such there is benefit in pursuing an interdisciplinary approach to secure optimal outcomes. This especially applies to the project environment where the temporary nature of the organisational structure can provide an added layer of complexity compared to stable or ongoing organisation structures (Andersen 2008; Andersen, Dysvik & Vaagaasar 2009; Checkland 1981; Winter & Szczepanek 2009).

2.2 Performance, influence and behaviour

Intuitively there is a relationship between how we behave, how we influence others and how we perform in the tasks we apply ourselves to. The challenge is that different people have a completely different view of what behaviour is appropriate in different circumstances and this varies even more when cross cultural groups are involved. What is expected in one culture may be desired in another, only tolerated in another and perhaps not tolerated in yet another. Culture reflect (and protect) the standards and norms of that group, and despite the fact they evolve over time, there are very large differences in behavioural norms across them. Another complicating factor is that with the ever increasing trend of globalisations, many more cultures are exposed to each other and there is an expectation that they need to collaborate in large complicated and often time-limited project situations.

Hofstede's ongoing study of global cultural dimensions (Hofstede, Hofstede & Minkov 2010) highlights the degree of difference between cultures and discusses the challenges these bring to multicultural collaboration. The Global Leadership and Organizational Behavior Effectiveness (GLOBE) research program (House et al. 2004) extended this work to understand the differences in leadership styles showed how different cultural norms respond differently to leaders. These insights provide a stereotypical view of how people interact with each other and what is likely to influence them. However, they do not guarantee we can predict how an individual from any specific culture will behave. Whilst there is alignment across the studies, the study authors, recognised as the global experts in these fields, still disagree with each other on certain aspects of the frameworks and measures (Hofstede 2006). These two major studies were conducted over decades involving hundreds of expert

researchers and highly sophisticated detailed data gathering and analysis. This highlights the challenges project managers have when they are expected to take a group of individuals, who may not have worked together before, in tight scope and timeframes to make a project work. Project managers are often not even trained in the basics of project management, let alone the complexities of cross-cultural interactions. The current project management professional association training approaches still rely heavily on the tasks of “delivering projects to time and budget” with a range of tools built around objective outputs and measures. However, there is still very limited emphasis on soft aspects in project manager training.

“Soft skills” (Rouse 2011a) and “hard skills” are terms commonly used to in industry to generically refer to capabilities of a person. Soft skills collectively represent the behavioural competencies (driven by high emotional intelligence quotient or EQ) or people skills. These include (amongst others) the ability to engage participation, influence, communicate, negotiate, “read” people, build teams, manage and resolve conflict. People who have good soft skills make more effective leaders and are effective in dealing with people and relationships. Hard skills (Rouse 2011b) by contrast are more focused on getting tasks done effectively and more often associated with Intelligence Quotient (IQ rather than EQ). Hard skills are about being efficient and effective at implementing a particular act such as building a product according to the specific design, analysis of data, software development and other more logic focused activities.

Online reference source, Dictionary.com refers to soft skills as:

“Desirable qualities for certain forms of employment that do not depend on acquired knowledge: they include common sense, the ability to deal with people, and a positive flexible attitude”,

But does not provide a definition for hard skills. So almost by default (and certainly by common usage) this term relates to those skills and competencies that do not relate to people interactions and social relationships.

Culture is a term that we use to ascribe a particular set of behavioural characteristics to a group of people. It can represent how they interact with each other, which is an outcome of what they accept and reject as acceptable with that group. Culture (in this

sense) can be applied to any group of people from a small team, to an organisation to a nation, or even group of nations (e.g. Asian Culture). Dictionary.com provides a simple and workable definition for how culture is used in the context of this thesis: *“The behaviors and beliefs characteristic of a particular social, ethnic, or age group: e.g. the youth culture; the drug culture.”* Another definition of culture as a verb can be found here that is relevant to action research to provide a sense of growth (in intellect and capability):

“Development or improvement of the mind by education or training.”

This is relevant as action research aims to teach and nurture participants to develop them in some way so they can generate positive change in their environment.

The latest version of the PMI® PMBOK® (PMI 2008) has an improved amount of material on soft skills such as leadership, but it still amounts to less than a fraction of a per cent of the entire document. Furthermore, it states these aspects like rules with phrases like they “must” or “should” be managed, without providing any guidance on how one can do these effectively and why they are important. The PMBOK® is a guide of what is to be done, rather than providing helpful instructions on how to achieve them. This demonstrates there is still a long way to go to evolve the human aspects of the project, which we all intuitively know more often have more impact on the project outcomes more significantly than the technical aspects.

The good news is the profession continues to evolve and whilst there is continued focus on creating better analytical and objective tools, there is now a growing attention being paid to some soft aspect of PM (Andersen 2008; Andersen, Dysvik & Vaagaasar 2009; Müller & Turner 2010; Andersen, et al. 2006). The problem with this is that most of the literature being generated is advocating the need for better soft skills in projects, the vast majority of this research is detailing WHAT is required rather than HOW and WHY this is of benefit.

This research proposes to add to this shift by providing some specific simple interventions that will assist the average project manager to be able to positively engage their team in constructive conversations about behaviour and its impacts on project outcomes. The objective is to not only better understand behaviour through a

simplified metaphoric approach, but to enable them to proactively manage the behavioural environment to leverage behaviour as an asset to influence and motivate, rather than suffer from its unmanaged consequences.

2.3 Metaphor as a tool

Dictionary.com (2011) summarises the sense of a number of definitions of metaphor found in traditional hard copy dictionaries with: *“a figure of speech in which a term or phrase is applied to something to which it is not literally applicable in order to suggest a resemblance, as in ‘A mighty fortress is our God.’”*

or

“Something used, or regarded as being used, to represent something else; emblem; symbol.”

Illustrative examples from Lakoff and Johnston (1980) include “time is money” or “argument is war”. In addition to words, images and symbols can also be used as a metaphorical representation – this is seen in the use of caricatures and metaphoric cartoons.

In this sense, a metaphor transfers a meaning between one party and another by highlighting a similarity with something more familiar or more easily understood. This aspect of metaphor, understanding and experiencing one kind of thing in terms of another, makes it a powerful mechanism for transferring new meanings. For example, Ivie (2003) adjusted the thinking of students by describing life as a waltz rather than using the predominant competitive games based metaphors. This mind shift provided a vastly different perspective and influenced their behaviours and approach, enabling the students to consider interactions with each other as learning new steps with partners instead of constantly striving to win.

Despite the recent interest in metaphor, its use is not new - not even to business. Metaphor has been embedded into our customs, religions and language for centuries. Metaphor has also historically been used to simplify learning and knowledge transfer in scientific fields (Andriessen, DG 2008; Lakoff & Johnson 1980). Gberardi (2000, p. 1077) paraphrasing Lakoff and Johnson (1980) stated *“We can ask what a metaphor means and also what a metaphor does and, in both cases, the answer is situated in the context of interpretation/interaction of the people involved in the*

situation: learning takes place in language and through language." Christie (1991) postulated that metaphor is deeply embedded into the scientific thinking of both westernised science and of the traditional knowledge of the aboriginal peoples of Australia. The military metaphor is still in wide use in business despite confrontational methods of leadership being less well accepted (Windsor 1996). Metaphor is widely used across cultures in a range of ways and is embedded into how we interact with each other (Gannon & Pillai 2010; Grisham 2006; Inns 2002; Morgan 2006; Winter & Szczepanek 2009).

Metaphor has a wide variety of application across a range of fields including social research, problem-solving and policy making (Schön 1993) and understanding organisational culture. Machine and organism metaphors were used by Morgan (2006) and Mintzberg (1989) to highlight the differences in organisational cultures and as a way to understand how to act within these (mainly business related) different environments.

Metaphors can be effective for understanding, even when they do not directly apply to situation. Vinten (2000) discussed how religious metaphors are common in the business environment to convey meaning, highlighting Charles Handy's (1978) *Gods of Management* as one example. Haley, Low and Toh (1996) described how the Singapore government successfully developed Singapore Incorporated as a metaphor for their sophisticated marketing plan to focus their strategic efforts and attract outside investment.

It is the common understanding of the metaphor, rather than the literal context, that make it useful. Inns (2002) created six categories of metaphor aligned with how they are applied:

- to examine the root meaning of a subject,
- for research,
- for teaching,
- as a generative tool for creative thinking,
- to help deconstruct or question embedded assumptions
- as a means to influence perception and interpretation.

These categories help to understand the specific ways metaphor can be applied as a tool. One example of a creative metaphor that addresses several of these applications is the “The Tango Metaphor” proposed for the understating of cultural norms devised by Nielsen and Mariotto (2006). They analysed how the iconic tango can represent recognisable aspects of Argentine behaviour and values and can help others to learn more about that culture.

Using a range of metaphors provides a different set of ways to interpret or make sense of the subject we are seeking to understand. Each metaphor provides a different perspective and each also has limitations. Looking through a metaphor provides a specific context to find similarities between the topic and the metaphor as well as differences. These in turn provide perspectives to discuss amongst those involved in the sense-making exercise. Dialogue around these metaphors enables rich conversations and a creative exchange of ideas that would not happen as well without the influence of the metaphor.

Two useful examples of this are:

- the “diagnostic reading” of Multicom by Morgan (2006, p 350) in which he uses seven different metaphors to gain a comprehensive understanding of the corporate culture and
- the comparison of a park ranger and a “leading lion” to contrast collaborative and control and command leadership styles (Shelley 2010)

Animal metaphor and imagery in culture and business

Animal metaphor and imagery is very common in most cultures and has been so for a long time. So much so, they seem to fit naturally and we hardly even notice they are there. Ancient cultures such as the Australian Aboriginals incorporated animals into the way they believed their world was created and how they should interact with it (McLeod, Jones & Barker 2001). Aesop (Kurke 2011) incorporated animal metaphors and images into fables to educate and reinforce cultural expectations and George Orwell’s (1946) *Animal Farm* was written as a political satire to expose political shortcomings in society. Similarly, the *Panchatantra* is a series of ancient

stories from India incorporating animal characters used to convey prudent worldly conduct, or "the wise conduct of life" (Anonymous 2012a; Bedekar 2008). These stories have been translated to many languages over the centuries and continue to have new versions published. Buddhist culture also incorporates animals into their traditional stories to reinforce cultural norms (Kawasaki & Kawasaki 2011). *The Jātakas* are a body of stories explaining the previous lives of Buddha in which Buddha may appear as human or a range of animal forms including, elephant, hare, bird and monkey. The animal forms are used to characterise how important virtues such as generosity, wisdom, patience and compassion were gained by Buddha through his evolution across life cycles. These important cultural stories highlight the long cultural relationship with animal entities in this culture.

Animals have been used as a source of inspiration and derision since early civilisation. We can be "*busy as a bee*", "*quiet as a mouse*", "*cunning as a fox*", "*stubborn as a mule*", "*quick as a hare*", and "*wise as an owl*". All forms of literature and on-line resources present examples of animal metaphor or identities which are accepted across cultures. However, some care needs to be exercised as the significance of some animals can carry different meaning in different cultures. What is viewed as a positive metaphor applicable to people in one society could be considered culturally sensitive or derogatory in another. In recent times a number of animal-based behavioural profiling tools have appeared through the internet, some very basic and some more complex. Some of the more robustly supported examples of this include one based on books *Surviving Your Serengeti* (Swanepoel 2011) and another on *The Organizational Zoo* (Shelley 2007). These tools are not meant to be rigorous research and development profiles, but are useful as interactive conversation starters for people to engage in constructive conversation about behavioural differences and the impact these may have.

Most people can intuitively relate to the use of animal metaphor and readily identify themselves and others with animals. Both positive and negative metaphors are in common use, which are bestowed upon lovers, family, friends and enemies. There seems to be no boundaries to how they can be applied. Our behaviours can be described as catty, bitchy, snaky, ratty, off with the birds or any number of endless

possibilities borrowed from our animal cousins. We may be like a bear with a sore head or a cuddly bear. Perhaps we may be sheepish about ferreting out whether our partner is engaged in some monkey business. Or becoming more colloquial in Western language, when someone ratted on a friend, their goose would be cooked.

In many cultures, exposure to animal metaphor happens very early in life through traditional children's stories such as Beatrix Potter's stories of Peter Rabbit and farmyard friends. These stories use animal characters to represent certain personality types that children could relate to. They come to understand which are acceptable and which are less desirable. Peter Rabbit is a typical disobedient young boy who was always getting into trouble which was a real contrast to Benjamin Bunny and Jemima Puddle-Duck who represented more conservative behavioural styles. Animal characters can be built from a common interpretation that spans cultures. Almost generically, eagles represent leadership and snakes represent political behaviours. Some animals have specific meanings or significance in their home countries such as elephants in Thailand, pandas in China, the camel in Arabic cultures or koalas in Australia. There are some cultural differences for some animals, such as the owl representing wisdom in western cultures, but is associated with death in China (Zhang 2011) and with interfering or "nosey" behaviour in Vietnam (Hong 2011). Such differences can be deliberately leveraged or smoothed over by creating a common understanding of how the animals are perceived when working in mixed cultures (Zhang 2011). In Asian countries there are different animals that are represented in their behavioural idioms which are more familiar to their local customs and practices such as buffalo in Vietnam and panda in China. In both of these countries, the mythical dragon is highly revered. In Vietnam, the dragon is an ultimate metaphor of success, strength and power and its image is associated with that of a noble, superior person. The dragon itself is a combination of many animals, being described in local folk law as having the strengths of many animals such as snake body, carp scales, devil eyes, deer antlers, mammal ears, camel forehead, crocodile legs and hawk claws. The dragon is deeply embedded into the local language symbolizing the king in the eyes of common people. King's throne is named dragon's throne (long ngai); king's palace is dragon's place, likewise, king's bed is known as dragon's bed (long

sàng). This highlights how metaphor and imagery can be deeply cultural, influencing the customs and practices of a people and their communities.

In modern “westernised” cultures, animals have been embedded into a range of media, including how we entertain our children and influence them through stories and cartoon characters. Mickey and Minnie Mouse, Goofy, Pluto, Pooh Bear and Tigger (Disney 2010) as well as Daffy Duck, Tweety, Wile E Coyote and Bugs Bunny (Warner Brothers 2010) are examples from broadcast media forming part of the behavioural stereotypes we begin to recognise and identify with from a young age. These characters are more than just entertainment, they influence and engage through representing a certain set of behaviours that are more effective and creative than using a human character. These behavioural stereotypes become part of patterns that we represent from an early age and are often added to through the use of colour and music. “Bad characters” are often dressed in black and accompanied by “dark” music and “good characters” are colourful and accompanied by bright positive tones. Over time, these reinforce our behavioural consciousness and often influence some unconscious decision-making.

Commercial enterprises have long known of the power of using people’s warmth and affection for animal tokens - Rosella (Australian foods), Kiwi (international shoe polish), Eagle (USA Insurance), Camel (Global cigarettes) are just a few. Because of this constant exposure, animal metaphors have infiltrated languages around the world in subtle ways and as a result are quickly understood. This is exactly why they have so much power for engagement and are a great place to start a conversation about meaning.

Applying metaphor to build and maintain relationships

Understanding how and why metaphor works in theory, does not mean that we know how to apply it in an effective way in the real world. To achieve our desired outcomes - that is, to positively engage and influence others - especially those above us – we need to design and implement interactions that work in practice. This section explores how metaphor can be applied in practice to achieve desired outcomes such as

developing trust, enhancing relationships, understanding behavioural dynamics (especially in teams) and targeting behaviours of stakeholders to influence them.

Presenting theories to business leaders is not usually a productive approach! You will often be seen as patronising, impractical or irrelevant. Almost invariably, approaches involving poorly constructed, or shallow, metaphors disengages stakeholders. At best you might be asked “So what?”

A more effective way to influence those above you (and others) is to use the theory (or a combination of theories) as the foundation of an interactive activity that demonstrates the value of developing relationships. Creating an environment where the stakeholders become embedded in an activity or dialogue they identify with and are (reasonably) comfortable participating in stimulates interactions that are more likely to influence them. The more uncomfortable participants are likely to be in a planned intervention, the tighter the participant group needs to be to ensure engagement. A group of participants with strong relationships and deep trust can be pushed well beyond their comfort zone and this can generate strong learning. However, care must be exercised with groups who do not know or trust each other or who represent widely mixed levels across the organisation. No one wants to look foolish in front of strangers or their boss. It is equally unlikely that participants from different levels of the hierarchy will offer “out of the box” thinking in front of people higher or lower chain of command, as they will play safe. Creating a “safe-fail” (Snowden & Boone 2007) environment is critical for open exchange. An environment which makes people feel safe and willing to take calculated risks enables the introduction of new concepts, innovation from old ideas and open dialogue to flourish. Trust is earned through working with others, exchange of ideas through “Conversations that Matter” (Shelley 2009), described in research instruments in section 3.8, and finding paths through both successes and failures. Relationships are built over time through collaborating on difficult issues, constructively talking through failures to learn from them and of course celebrating successes.

Many metaphoric models are limited in scope in that they apply to a specific instance. Whilst this is useful for that situation, there is value in having a more flexible and

comprehensive model that can be applied across a wide range of contexts. One such model is *The Organizational Zoo* metaphor (Shelley 2007), which is described in greater detail in research instruments in Section 3.8.

2.4 Metaphor to enable conversation

Effective facilitators know the value of “ice breakers” or “conversation starters” to stimulate conversations between participants. They understand that the art of facilitation (and effective analogical teaching) is to fuel interactions between participants to trigger sharing and transfer of knowledge and ideas amongst people, rather than be the source of the knowledge. This approach, like many aspects of this research project, is not new and was introduced into teaching practice by Bloom in the 1930’s (Bloom, Hastings & Madaus 1971). Subsequently, the analogical techniques were further developed by Knowles (1984) and after his death by other researchers through several editions of knowledge classic *The Adult Learner* (Knowles, Holton & Swanson 2011). Part of the success of these methods is to enable fruitful exchange of ideas between the people engaged in the learning and the assumption that these interactions result in learning outcomes for all. This happens both through the sharing of what is already known, as well as the creation of new knowledge as a result of these exchanges. The principle of engaging people in thinking aloud with others to generate ideas has been adopted in commonly applied generic processes such as brainstorming as well as to some more complex thinking and talking interactions, such as the De Bono’s *Six Thinking Hats* (de Bono 1985) and Stacey’s *Complex Responsive Processes of Relating* (CRPR) (Stacey, Griffin & Shaw 2000).

Metaphor has also been successfully used as the stimulant for similar conversations in business contexts by a range of practitioners, with the most advanced versions of this being driven by Lakoff and Johnson (1980), Morgan (2006), and more recently in a specific project context by Winter and Szczepanek (2009). All of these have highlighted the richness of metaphor as a means to transfer complex knowledge and meaning to make sense of novel situations. Winter and Szczepanek developed their “Images of Projects” as a pragmatic and social framework to discuss projects from multiple perspectives and engage participants in developing a collective richer understanding of the social implication of their projects. They (Winter & Szczepanek

2009, p. 219) stated “...the social processes of people relating through thinking and talking together. And it is this process that the images framework is designed to enrich and facilitate through groups of people using it as a common language.”

The successes gave confidence that metaphorical frameworks can work in business and that if a framework is sufficiently mature it can be appropriately used to stimulate valuable conversations in a business context. This research takes this foundation and the Organizational Zoo metaphor framework to explore whether metaphors for behaviour could be used to stimulate constructive dialogue about behaviours in order to enhance the team outcomes.

2.5 Behavioural profiling to understand team environments

Myers Briggs Type Indicator (MBTI)

This tool is in common uses to assist in understanding an individual’s personality references (Bayne 1995; Briggs-Myers 1980). MBTI is relatively quick to perform, quite easily understood and used extensively by industry, government and education personnel as a quick assessment to understand preferences. The process involves a questionnaire feedback and class discussion on different personality types and their implications in the workplace and is performed as a self-completed survey, it categorises people into 16 types based on four scales (Quenk 2009).

Hogan Assessment Systems (HPI, HDS, MVPI, HBRI)

This tool is one of the most sophisticated (and therefore expensive) on the market and has quite extensive research backing. Four different profiles assess different aspects of the subject’s personality strengths and weaknesses. The four key reports areas are: Personality inventory (general characteristics, strengths and weaknesses), Development Survey to highlight areas that can be enhanced for professional performance), Motives Values Preferences (underlying stimulants for the subject) and Business Reasoning (an assessment of general business acumen). The profiles have extensive internal validity checks to verify consistency of results and are generally

used by large businesses across the whole lifecycle of an employee's engagement with the organisation from recruitment through to senior development and succession plans (Hogan & Holland 2003).

Herrmann Brain Dominance Instrument (HBDI)

This tool is quite intuitive to understand as it provides a highly simplified version of a subject's thinking preferences through a ranking of 1-3 across four colours. Each colour represents a preference as follows (profiles stated in this order): Blue - represents logical and fact based analysis, Green - organised, planned detail, Red - interpersonal and feeling or emotional aspects and Yellow - the holistic intuitive creative synthesis aspects. So a profile of 3, 3, 2, 1 would represent a highly logical/analytical organised task focused person that is moderately emotional and not very intuitive or creative. So the interpretation of this would suggest the candidate may be comfortable as a technical researcher, but not someone who would find customer engagement roles comfortable. This tool is of moderate cost and is commonly used in business to assist people understand their thinking styles and how well their style matches their role (de Boer & van den Berg 2001).

The Organizational Zoo behavioural profiler

This tool (Shelley 2008) was created based on The Organizational Zoo animal metaphor framework (Shelley 2007). His experiences in working in international projects and a range of literature on emotional intelligence was used to fine tune the tool and its ability to assist understand behavioural impacts in organisational and team settings. The key difference between this profiling tool and many others is it is specifically designed to leverage the diversity of behaviours available in the workplace (or other communities) and highlights people can choose to behave in different ways in different contexts. It acknowledges that situation based behavioural choice is appropriate providing this does not contravene the person's values. Behaviours are expressions of an individual's experiences, values and what they consider to be "appropriate" for a given context. Successful people know how to appropriately adjust to create mutually beneficial outcomes. The on-line profiler

requires the subject to sort six words (from seventy-two) into each of four categories to highlight how they are likely to behave in a set context. This generates a profile of five animal based metaphorical characters which represent individual behaviours displayed.

The tool is free, easy to use (approx. 10 minutes to do the on-line profile) and interpretation is intuitive. A feature of this tool has that other' struggle to show is the ability to understand the relationships between the behaviours. It is clear how the relationships between Lion and Mouse goes (compared to how the Myer-Briggs categories will interact: for example, how do ENTJ and ISTP interact) as the animals represent the behaviours they would display in nature. A key strength of the tool is it highlights that everyone can use any of the behaviours, although some may be more comfortable than others depending on your own preferred style. The tool was used in this PhD research as a stimulant for dialogue, but was not the subject of study *per se*.

DISC

This is a popular tool for workshop facilitators to do a “quick and simple” conversation starter, highlighting the behavioural differences between people (Furlow 2000). The DISC Personality System has a specific language around which a subject's behavioural style is summarised into one of four letters: D for drive, I for Influence, S for Steadiness and C for Compliance. This tool is useful as a simplistic way to get people to “box themselves” within a context to create a basic awareness and to engage with others based on this. However, its simplicity limits its ability to be used as a behavioural developmental tool (which it does not claim to be either). It is used to show that people with similar styles tend to exhibit some common behavioural characteristics and understanding this can assist them to know each other without the need to perform complex behavioural profiles. Although the developers claim that all people share these four styles in varying degrees of intensity, the depth of the research and data behind this is limited and this is acknowledged by the creators of the system (Anonymous 2012b).

This brief list of tools is far from being complete. It just provides a brief to those most commonly used in business which represents a range of cost categories from

free through to in excess of thousands of dollars. Some other categorising tools also get wide use are based on different aspects of human personality, such as Enneagram Personality Types based being on “spiritual personality types”. The Enneagram Institute (Riso & Hudson 2012) highlights that *“without real self-knowledge, it is not possible to awaken to the deeper truths of the soul or to sustain whatever degree of realization we have attained.”*

The key reason for including a brief introduction to several of the popular profilers is to highlight there are many different ways to assess behavioural styles and different methods appeal to different people. Whilst they all have application, one should use any tools with caution and be aware of their limitations. The basic concepts from each one come from the experiences and beliefs of an individual or small number of researchers and the amount of academic literature supporting or challenging their foundations is limited (although some are very widely used and the outputs are discussed, assessments of the validity, consistency and reliability of the concept is less well documented). One can constructively use the outputs of them all to fuel quality reflective conversations, provided you remain aware of the pros and cons of each system and their limitations. The key thing is to use a tool that assists you to understand yourself and enables you to relate better with others. Use the tools as a stimulant for self-reflection and even insightful conversations with others about different perceptions you may have of each other to enhance your development and behavioural capabilities. It is critical to note that these tools are largely self-assessments and should not be used to categorise yourself in any limiting way.

2.6 Influencing team members and stakeholder engagement

Engaging the interests of stakeholders is as much art as it is science. The better you understand your stakeholder(s) the better you are likely to be able to stimulate their interest, influence their mindset and increase the time they invest in thinking about the project, idea or concept you want them to support. The way you behave influences how you interact with them and what level of respect and participation you will receive from them. The outputs of this include their initial level of interest in you or your initiative, whether your communications to them get read, or how involved you

can be in the decision-making processes. These outputs determine the quality of the (more intangible) outcomes such as relationship, credibility, trust, engagement, acceptance, access to their stakeholders and ultimately how well you can perform your task with their involvement.

Journalist Matt Lauer (and several others) was attributed with stating “*you never get a second chance to make a first impression.*” (ThinkExist.com 2010). This highlights the importance of understanding your stakeholder before you first engage with them – doing your homework. Opening a conversation to get to know an important stakeholder is risky. A far more productive approach is to do some research and find out who they are, some of their successes and “learning opportunities” (failures), their behavioural style, their key advisors and adversaries and what they choose to do in their discretionary time. Being armed with such knowledge improves the probability of creating a positive first impression. A positive first impression buys more time to build the foundations of a relationship. A negative first impression with a busy senior person probably means opportunities to collaborate or influence them are reduced.

A key to successful stakeholder engagement is to understand the behaviours of the stakeholder before you engage. Knowledge of animal metaphors enables you to have conversations with others about the behavioural profile of the stakeholder in a more objective and non-political way.

Stakeholder matching experience

Stakeholder matching is one activity that is used to familiarise workshop participants with the Zoo metaphor (and one that some of participants in this research applied in their organisations - refer to the reflective diaries for examples). The purpose of stakeholder matching is to understand behavioural similarities and preferences between parties, so that the similarities can be leveraged and the differences mitigated against in order to develop better relationships (Shelley 2011).

One example of the application of stakeholder matching in the researchers experience was where a team needed to implement a new computer system in a company they

had just taken over. They were aware there was a degree of resentment in the acquired company. It appeared likely that any advice they provided for the acquired company would be treated with disdain. The team realised that they needed to build a sense of trust with the key people in the new business and looked for a way to do this. They instigated a conversation about the behaviours of the key clients with the members of the acquiring team using the Zoo Character cards as a fun way to engage them in the conversations. The fact that they focused on the behaviours as an external factor to be managed and on external partners, enabled a constructive conversation that provided them with insights into the behavioural norms of the acquired business. As a result of this initial conversation team members also developed an understanding of the people they were dealing with in the acquired business and began a relationship with them. They were able to target the similarities between members of the two businesses and create alliances. This led to a second stakeholder matching conversation around who in the acquiring business was best placed to support whom from the acquired business. The fact that they had already engaged on the first dialogue created a positive and fun outlook for the second conversation, leading to constructive outcomes. The awareness of the behavioural strengths and weaknesses of the team as a whole helped them to discuss their approach in some difficult situations. For example, the team was strong on task orientation, but weak on aggression. When the time came to pitch an initiative to some senior decision-makers, they planned who would be best to pitch to achieve the best outcome. This gave the combined team the outcome they required and they realised they were stronger as a collaborating group leveraging their behaviours than as a competing group trying to be territorial about their own expertise areas.

It is possible that the two teams could have developed trusted relationships without the metaphor tools. However, the ability to separate people from behaviours and talk about impacts of behaviours in a non-political and constructive manner seemed to help trigger the right environment and relationships in this case. There have been many examples where the behavioural preferences of stakeholders have been assessed in this way to optimise relationships and sustain longer term involvement of them in projects. It is a simple and enjoyable way to facilitate interactions that lead to deeper understandings and greater influence of those around you.

2.7 Project Success: outputs and outcomes for PM professionals

Organisations rely on processes to maintain agreed practices and projects as the preferred method to introduce significant change. As the pace of technology development has accelerated and the scope and reach of organisations increased, larger scale projects have become more common with greater value at stake. Although these changes create potential for bigger value creation, they also introduce greater complexity and higher risks. The simplest form of projects may be something that is done by an individual in a short time by themselves, but in most modern business contexts an average projects is significantly more involved, and often requires a team of people, a significant budget and considerable time. Very large and complex organisational changes require a program or portfolio of aligned projects (Taylor 2011) which may be supported by a formal Project Management Office (Perry 2009).

Projects are defined in many different ways by a vast range of texts (Andersen 2008; PMI 2008; Hodgson & Cicmil 2006). A search for “project management” on Amazon.com (April 2012) provided 65,000 titles to browse through, which highlights the volumes written on this topic in recent times. Many of these documents have their own definition of a project and although most are aligned, there are too many differences to attempt a detailed discussion here. My own experiences and through my reading some of the more respected of these documents, highlights some general characteristics of projects: Projects are differentiated from “normal” or routine work as being temporary and involving a discrete set of tasks designed and implemented to bring about change and new value. That is in simplistic terms, (successful) projects enable us to change the ways things are done to (hopefully) a better way, which then becomes embedded into a new “normal way of doing things” (at least until the next project continues the cycle of evolution).

PMI's *Project Management Body Of Knowledge*® (PMI 2008) is one of the most commonly used guides to help project managers understand the terminology and scope of processes and activities to be a competent project manager and highlights the key criteria to be managed as time, quality, cost and scope. However, to get to the next level of understanding of how to effectively manage a project, requires reading the rest of the 459 pages. To help Project management professional associations such as AIPM (AIPM 2012) and PMI® (PMI 2012) started to form from the mid-1960's, and an international federation of similar associations formed in Europe in 1967 as the International Project Management Association (IMPA 2012). These professional associations assist greatly in development of the project management profession through the enabling of sharing of ideas, stimulating forums for dialogue and knowledge development, creation of standards and guidelines, providing a political body for advising of policy and governance, sponsoring development research and providing education and training for new people to the field (Crawford et al. 2006; Morris et al. 2006; Morris 2011; Winter et al. 2006). Most of the associations have formal accreditation processes to demonstrate competency standards for project managers and maintain lists of registered members, so those looking for someone of acknowledged competency can be sourced for relevant roles.

Despite all this detail and complexity, and like most management disciplines (Drucker 2006), the recognition of project management as a formal profession is a relatively recent phenomenon (Morris 2011). Morris provides a history of the development of project management, highlighting that most of the basic task orientated processes were developed by Henry Gantt and Henri Fayol in the early 1900's. However, "formal recognition" of project management as a management field did not start until the mid-1960's when the project management associations mentioned above started to more clearly define what projects are and how they should be done to deliver better outcomes. Since that time, huge progress has been made in the establishment of the "science" of WHAT projects are and HOW they can be done through the documentation now available. However, the truth is that until VERY recent times, most of the documentation has been focused on the tasks themselves and not the human side of delivering effective projects. The other limitation is that the project was largely being looked at as a separate entity and not as a piece in a much larger

and more complex people, organisational and social context. Even now, project managers are largely measured and rewarded by the completion of the tasks they “delivered on time and on budget” OUTPUTS rather than if the project achieved its (often more intangible) OUTCOMES. The irony is, the outputs represent the delivery of the project and represent the cost and POTENTIAL of the investment, whereas the outcomes represent the delivery of the tangible and intangible value realisation. Some projects considered a disaster at their time of completion have generated far more value than their cost such as the Sydney Opera House (Bourne 2007). In contrast, others considered a “project success” have been a commercial disaster, such as the Lane Cove Tunnel in Sydney (O’Sullivan 2010). The true measures of project success need to be considered in a wider social context and over a longer period of time (Andersen et al. 2006; Bryde 2003; Müller & Turner 2010; Nogeste, Kersti & Walker 2008). Some informed organisations are now looking to measure the performance of projects, not only the delivery of the immediate tasks, but also on the longer term outcomes from the project.

Many modern projects have become large, expensive and highly complex challenges making them more difficult to manage effectively. These projects often involve many people from different backgrounds to fill many roles including leadership, functional, technical (e.g. engineering, infrastructure, information technology), communication, change integration, education, training and specific knowledge (Vidal & Marle 2008). Such complex situations involving people from different cultures and behavioural preferences provide challenges and stresses for the project team members and leaders and require behaviour and conflicts to be actively managed (DeChurch & Marks 2001). Projects provide a great opportunity to leverage this diversity of talent and behaviour to stimulate innovation (Bierhoff & Müller 2005), but this variation can also generate tensions between the project team and the wider organisation through misunderstandings that can lead to significant negative impacts on the project outcomes (Andersen, Dysvik & Vaagaasar 2009).

Although behaviours displayed by project leaders and team members does impact performance (Cervone 2008; Jacques, Garger & Thomas 2008), there is little written on how to actively address this in a practical and constructive manner. Andersen *et*

al. (2006 p. 144) stated “project impact as well as captured experience both benefit from rich project communications, a factor which is less based on project management methodologies and more dependent upon the application of “softer” skills.”

Projects are the ideal way to implement positive change into organisations in order to improve performance. However, an unfortunate reality is that many projects fail to deliver their expected outcomes and project failure has a significant negative economic impact across a wide range of industries (Chua & Lam 2005; Ojiako, Johansen & Greenwood 2008). A range of sophisticated project management methods and tools for project activities including planning, budget control and risk and resource management have been developed to increase project success rates. However, so far these management tools have not sufficiently evolved effective techniques to manage team behaviours and dynamics (Müller & Turner 2010). Over the past decade there have been a growing body of literature that has become more focused on these softer aspects of projects including, social and political (Hodgson 2007; Hodgson & Cicmil 2007; Morris et al. 2006), learning (Crawford et al. 2006; Andersen, et al. 2006; Winter et al. 2006), value generation (Winter & Szczepanek 2008; Winter & Szczepanek 2009) and professional development (Hodgson 2007; Muzio et al. 2011; Paton, Hodgson & Cicmil 2010). This shift in emphasis from doing the mechanical tasks of a project to understanding and leveraging the human elements from a project are represent an important evolution in the development of the project management profession.

The purpose of conducting a literature review is to make sense of what has already been done and also to reflect on how to move forward with the next steps. Both of these processes, that is, reflective practice (Schön 1995) and sense-making (Weick 1995) are embedded throughout this whole process and through the rest of this research. Ultimately we research in order to derive new meaning and understanding and to know how to act such that we are better off. These issues have been covered well in recent articles on how we can uncover rich insights in a complex and changing world (Weick 2007; Weick & Sutcliffe 2011). Both sense-making and reflection are

inherent components of action research and covered in more detail in Chapter 3 and of course are applied together to interpret the data generated from this research.

This research combines techniques and concepts from a range of disciplines to increase awareness and impact of behavioural interactions in projects. It is proposed that enhancing the richness of conversations about behaviours and their impacts, enables alignment of behaviours to goals and leverage of behavioural diversity to achieve success. The research specifically seeks to determine if and how metaphor can be leveraged to influence behaviour and knowledge transfer in projects to enhance outcomes. It gathers evidence in active projects across a range of organisations to deliver the three research objectives defined in section 1.4 and increase understanding of the three specific research questions listed in section 1.5.

2.8 Chapter Summary

This literature review highlights that behaviour has a significant influence on how people interact with each other, and yet few organisations proactively attempt to manage it in project environments. There appears to be an opportunity to enhance the performance of projects if there was a simple, intuitive and cost effective way to engage people in activities that increased their awareness of behavioural impacts and enabled them to interact more constructively with each other. The literature review also highlights the fact that metaphor is widely used in many languages as a creative way to express rich imagery and concepts. It helps to create a sense of recognition and identity around an idea, concept or brand and is deeply embedded into how humans share information and stories. Several examples of how metaphor is being used in business are provided, but most are not sufficiently developed to form the foundation of an approach to stimulate conversations about metaphor that enhance project interactions. The aim for this study is to use action research to explore one of the more comprehensive metaphors to determine whether metaphor based interventions can enhance the behavioural interactions in project environments. Chapter Three describes how this will be done and the philosophical approach taken to complete the journey.



Figure 2.2 Word cloud for Chapter 2, visually demonstrating main themes
Details explaining the origin of this image refer to Figure 1.2 at the end of Chapter 1

Chapter 3 Methodology and research design

3.1 Chapter Introduction

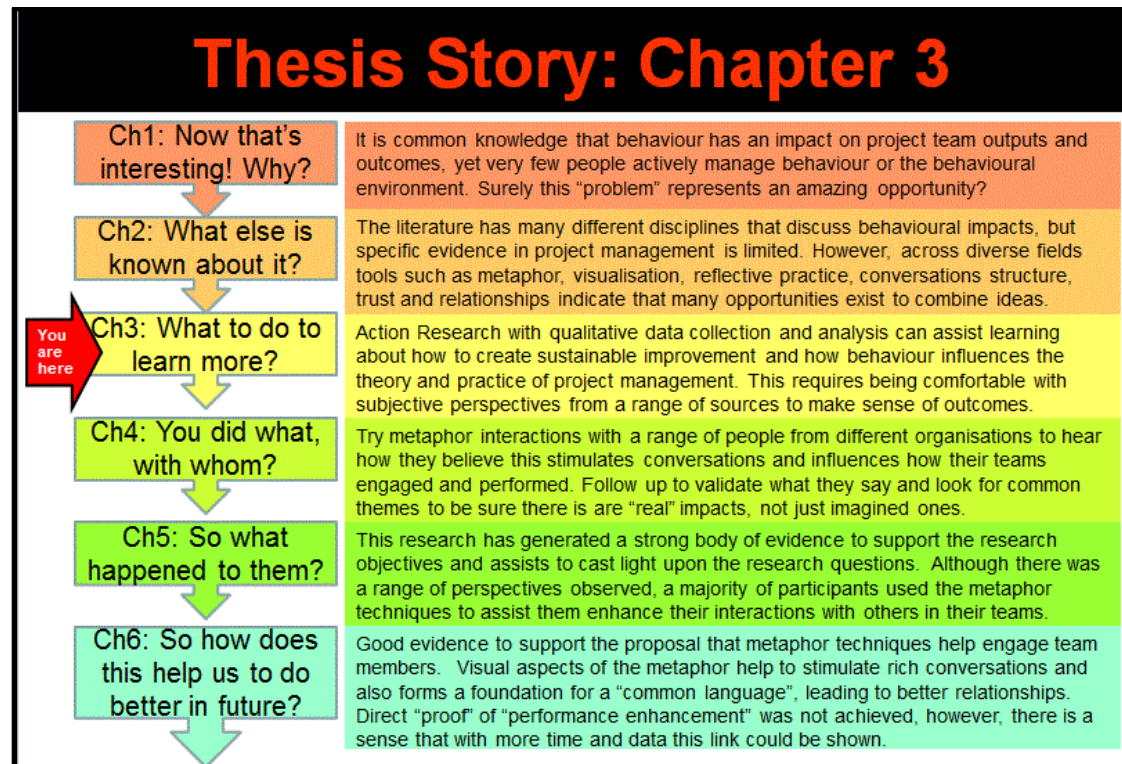


Figure 3.1 The story of this research: a flow through the stages of the research

Chapters One and Two introduced the foundations of how metaphor and behaviour are potentially important factors in the context of project performance and defined the research objectives and questions to be explored. This chapter builds on this to define a research methodology that provides a philosophical approach to explore how this might be achieved through action research with both relevance and rigour. Relevance is provided by working with four operational organisations on real projects they were completing which served as the environment for the research to be conducted. Rigour is provided by involving fifty-three people (49 research participants and four independent interviewees) across these four organisations, as well as eight practitioners who work independently of these organisations. Each person was able to provide feedback and reflections at several instances through the research about how the methods impacted on their involvement in the project activities. The impacts and findings of the design and approach detailed in this chapter, are documented and interpreted in Chapters Four and Five.

3.2 Link between the problem/opportunity and the research questions/approach

The problem of poor project performance discussed in section 2.2 has huge financial and emotional impacts on the livelihoods of people well beyond the immediate project. Projects come in all forms from single person activities of short time frame through to multinational, multicultural initiatives taking years to complete (Morris & Pinto 2004; Müller & Turner 2010; Winter & Szczepanek 2009). The bigger the project the bigger the potential benefits it will deliver, but also bigger the social and behavioural challenges are offered to contemplate (Andersen 2008; Andersen, Dysvik & Vaagaasar 2009; Smith 2007). Finding ways to engage stakeholders more effectively, build trusted relationships between the many players on complex projects, achieving ownership by the team and creating a sense of identity within the team are factors that are generically discussed in the project management literature, but only from the perspective that they are important and **MUST** be considered. The literature on **HOW** to effectively implement actions to achieve optimal outcomes in these areas is scant. The significant international collaborative work “Rethinking Project Management” (Maylor 2006) highlighted a number of areas of future opportunity that aligned with the aims of this research. Other publications have also echoed the sentiments of more work to develop the softer aspects of project management (Andersen 2008; PMI 2008; Winter et al. 2006). These reasons justify why this research is important and why the questions are closely aligned to these areas of practice. There appears to be little research in the area of creative metaphor interventions in a project team environment, specifically for the engagement of team members. This highlights a significant gap in the project management theory and practice that may address some of these known problem areas.

3.3 Choice of the research paradigm

The philosophical position of the researcher is important to define for the readers, so that they can understand the logic and foundations to assist them interpret (and perhaps challenge) their findings. It is also useful to stimulate further development of the ideas and concepts this work contributes to the body of knowledge and expand them for future research.

A significant challenge in describing thinking, philosophy and approach used in this work is that the terminology used to define the philosophical basis of research varies. A plethora of terms and overlapping concepts have been developed through different schools of thought over time and have generated some inconsistencies in the way they are used by different researchers and authors. One example amongst many is the way in which a research paradigm is defined by authors such as Coghlan and Brannick (2010), Hallebone and Priest (2009) and Saunders, Thornhill and Lewis (2009). Hallebone and Priest focus their attention on business applications whereas Coghlan and Brannick provide contexts more for general social contexts and Saunders *et al* an even wider general aspect for application. The “research onion” image developed by Saunders *et al* is a useful starting point to try to categorise the different terms to achieve some clarity. Such differences in terminology definitions are common in most academic disciplines and industry applications, making it difficult to define exactly what the researcher means without creating a specific set of terms for one’s own use, thus exacerbating the issue. To avoid further confusion, this thesis adopts the philosophical terms and structure proposed by Coghlan and Brannick because (a) they are the most recent publication to consider a broad scope of the literature in the more interpretivist research areas, (b) they focus on action research and (c) the contexts they describe most closely match those of this research.

The subjective nature of behavioural research makes it difficult to measure and even more difficult to demonstrate a specific relationship between cause and effect. With a complex set of variables involved in attempting to understand the impact of metaphor on conversations and relationships, application of quantitative analysis is difficult. Although there may be elements of objectivity in some of the observations in such a study, there are many more complications of a subjective nature that need richer data to be collated and interpreted (reflections by the research participants first to share their perspectives of what happened help the researcher attempt to make sense of the situations, which informs the patterns in the data). It is for this reason that the qualitative rich data is collected and cycles of reflection are engaged in to allow the patterns to emerge from the data (thereby reducing the impact of the complications).

Potential complications of such research includes:

- Did the researcher explain the techniques well?
- How did the participants interpret what was being said and their understanding of the instrument?
- How did the behavioural environment influence, positively or negatively, the responses from the participants,
- Is it possible make any objective measurement of such data meaningful?

Situations such as these are ideal for action research (Coghlan & Brannick 2010) involving the researcher assessing the data to seek meaning through cycles of interpretation and sense-making (Smith 2007; Weick 1995). Deriving meaning from the data in action research is akin to the process of percolation, the researcher continues to flow through the data in cycles extracting the “essence” in order to savour its richness and benefit from it. Each cycle continues to develop the richness of understanding and create connections between points to highlight common themes. As differences and common insights are noticed, they can be reflected upon to develop a greater understanding of the situation and observed more closely in the next action research cycle (Coghlan & Brannick 2010; Dick 1999). The situations presented in this research were ideal for action research, because the intent was to, teach participants how to use the metaphor techniques, observe what change they could stimulate in the environment by using them and also learn from reflecting on what they could achieve by applying them. That is, there were multiple interactions happening that involved both learning, and at the same time generation of new understanding which aligns with the criteria identified for action research by a number of prominent researchers in this field (Checkland & Poulter 2006; Coghlan & Brannick 2010; Dick 1999; McNiff & Whitehead 2000; Mumford 2001; Reason & Bradbury 2001; Winter & Szczepanek 2009; Zuber-Skerritt 2002).

Dick (1999) defined action research as:

“... a family of research methodologies which pursue action (or change) and research (or understanding) at the same time. In most of its forms it does this by

- *using a cyclic or spiral process which alternates between action and critical reflection and*
- *in the later cycles, continuously refining methods, data and interpretation in the light of the understanding developed in the earlier cycles.*

It is thus an emergent process which takes shape as understanding increases; it is an iterative process which converges towards a better understanding of what happens.

In most of its forms it is also participative (among other reasons, change is usually easier to achieve when those affected by the change are involved) and qualitative.”

Johnson and Duberley (2000, p. 138) defined action research as: *“Participatory action research has two objectives: one is to produce knowledge and action directly useful to a group and the second is to empower people by raising consciousness.”*

They highlighted that action research enables a greater level of interaction between the researcher and those being researched, which suited the approach being taken in this research. Kemmis and McTaggart (1988, p. 3) defined action research as *“a form of collective self-reflective inquiry undertaken by participants in social situations in order to improve the rationality and justice of their own social or educational practices, as well as their understanding of these practices and the situations in which these practices are carried out.”*

This action research study involved cycles of interactions between the researcher and the research subjects that had two separate objectives:

1. Participant learning to build capabilities and enhance their ability to understand and generate constructive behavioural change
2. Generation of research findings for the researcher on the usefulness of metaphor as a tool to enhance such actions by the participants.

Iterative cycles of learning and development of research understandings though can be challenging to balance, as the motivations and benefits of the different parties can compete with each other (Nogeste 2006; Steinfort 2010). In this study, the action research process described by Coghlan and Brannick was adopted because the research objectives aligned with their broad definitions of action research should be (Coghlan & Brannick 2010, p. 4):

- *Research in action, rather than research about action*
- *A collaborative democratic partnership*
- *Research concurrent with action*
- *A sequence of events and an approach to problem solving*

The high level of participation of the subjects in constructing an understanding of their own environment represented relevant learning for them and their reflections on the application and impact of these techniques in their own environment formed a rigorous foundation of the research evidence (along with supplementary data from surveys and interviews).

Another reason an action research approach was chosen is because it combines both learning and generation of new research knowledge through a series of iterative cycles across multiple cases and this was an ideal way to explore the research objectives in such an emergent situation. The learning aspect of the research is the participants learn some techniques that they then try to implement as part of their own environment and then reflect on what happened from that (and ideally go through iterative cycles to further develop their capabilities on the use of the metaphors to continue to enhance their ability to influence others and enhance outcomes). The research aspect is to understand how the application of the metaphor impacted the participants and their target audiences. In these situations, it was not possible to predict what the outcomes would be and the participants needed to use reflection before and after the intended action in order to optimise the outcomes and determine reasons as to why they got the results they did. The role of the researcher in this research was to guide the participants in the use of the metaphor, assist with planning the intended interventions and collate reflections from the participants on how THEY perceived the use of the metaphor and what impact it had. The learning aspect of action research were well discussed by Dick (1999; 2009), Raelin (2001; 2006) and also by Winter and Szczepanek (2009). Raelin (2007) also highlighted the link between reflections and leadership development as well as highlighting the critical alignment between the research philosophy and the research approach, which is discussed in greater detail later in this section. An aligned perspective was presented from McKay and Marshall (2001), who proposed the “dual imperatives of action

research” as being problem solving (a form of learning within a specific issue context) and research. They explained the difficulties of researching the process being taken whilst actually applying the process to create outcomes in terms of developing solutions to real problems and suggested the action research approach was ideal for this.

This learning journey was an interesting experience for the author whose formal education prior to this study was in positivist scientific endeavours. Awareness of the importance of subjective and interpretive data slowly became apparent to the author over twenty-five years of working in project oriented environments. These experiences lead to the realisation that the difficult to measure aspects of projects such as trust, human relationships and intangible outcomes were the ones that created most value. This evolution of thinking from a positive perspective to one that is richer and more meaningful is similar to the journey described by Charles Handy (1995, p. 219) as *The McNamara Fallacy*:

“The first step is to measure whatever can be easily measured. This is OK as far as it goes.

The second step is to disregard that which can’t be easily measured or to give it an arbitrary quantitative value. This is artificial and misleading.

The third step is to presume that what can’t be measured easily really isn’t important. This is blindness.

The fourth step is to say what can’t be easily measured really doesn’t exist. This is suicide.”

3.4 Research paradigm

As stated earlier the evolution of research terminology has not been specifically coordinated and often the source of heated debate. As such there are inevitable grey areas between terms and definitions. Table 3.1 attempts to clarify which terms apply best for this research and show some of the overlaps in which terms can apply to the paradigm being adopted.

Table 3.1 Summary of the philosophical elements and paradigm of this research

Adapted from the table structure of (Heron & Reason 1997)

Dimension	Aspect	Elements and perspectives
Ontology	The nature of reality or being.	<p><i>Subjectivist (Interpretivist)</i> in that the participants create and interpret the meaning of the metaphor and the impact it has (perceived outcomes of their planned actions) with their stakeholders (through their reflective diaries) through a reality and existence that are subjective and interpreted.</p> <p><i>Participative</i> in that the reality is subjective-objective, co-created by participants' mind and context.</p>
Epistemology	The nature of knowledge, its origins, nature and limits. Helps the researcher understand the "reality" being studied.	<p><i>Subjectivist (Interpretivist)</i> in that participants create meaning around the existing knowledge and use this as the foundation for new meaning and understanding as they experience the research interactions.</p> <p><i>Constructionist</i> in that it entails collaborative subjectivist activities to co-create subjective new knowledge and findings through dialogue.</p> <p><i>Participatory</i> in acknowledgement of practical knowing, critical subjectivity and living knowledge. Subjectivity interactions between research subjects and researcher and the created environment, extends to experiential, propositional and practical knowing leading to co-created findings</p>
Methodology	How we come to know? What methods align with the philosophies adopted for these research contexts?	<p><i>Subjectivist (Interpretivist)</i> in that the methods used need to recognise and capture the qualitative nature of the interactions being observed. There is not one reality, only the interpretation of each participant which may be quite different, and potentially different after reflection.</p> <p><i>Participatory</i> in that collaborative action inquiry leads to <i>collation of qualitative insights</i> and primacy of practical learning. Development and use of language grounded in shared experiential context is aided by the framework of the metaphors which draw on both individual and group patterns of knowing.</p>

Dimension	Aspect	Elements and perspectives
Axiology	What is intrinsically worthwhile? Where does the value lie in this research and its findings- primarily academic/theoretical or fundamentally practical?	<i>Constructionist</i> in that propositional, transactional knowing is instrumentally valuable as a means to social emancipation, which is an end in itself and is intrinsically valuable. <i>Participatory</i> in that collaborative development of practical knowing how to flourish with a balance of autonomy, co-operation and hierarchy in a team culture is an end in itself that creates intrinsic value.
Voice	Who contributes to the knowing and learning? Who “gets heard” in the way it is reported?	The researcher’s voice manifests through creation of awareness of the metaphors and the behavioural environment. Research subjects actively participate the generation and validation of the findings through self-reflections on their actions.
Learning	The nature of the activity through which learning (new knowledge) is created.	<i>Participatory</i> in that researcher subjects are initiated into the inquiry process by the facilitator/researcher and learn through active engagement in the process. Facilitator/researcher requires emotional competence, democratic personality and skills to create the appropriate environment to foster such development.

This research adopts an interpretivist paradigm using a subjectivist ontology and subjectivist epistemology. This is appropriate for this research as the data gathered is primarily observed through the eyes of the participants as they learn to apply new techniques in their environment to create changes in the behavioural interactions using the metaphor techniques. Subjectivist (interpretivist) ontology was considered appropriate because the participants create and interpret the meaning of the metaphor and the impact it has (perceived outcomes of their planned actions) with their stakeholders (through their reflective diaries). Subjectivist (interpretivist) epistemology is considered by the researcher as appropriate because the participants together create meaning and understanding of the meaning and usefulness of the metaphor through their discussions and reflections. Predicting outcomes in advance to test as a hypothesis was unlikely to be of use due to the large number of variables. In such complex situations, with so many potential influencing factors, an emergent

approach represents the participant's reality more accurately than being able to implement a detailed plan without deviation. Their situations were not generally perceived as being like a "controlled experiment" in that they could just seek to understand what happened afterwards through reflection. They needed to be able to interpret what was happening as it happened and adjust their approach through their dealings with others in the workplace (within the realm of a generalised flexible plan).

Having participants explore the interactions for meaning and draw out their learning and perceptions of potential to change their performance is typical of an epistemic reflexivity, which Coghlan and Brannick (2010) reported is appropriate for an action research approach. Throughout this research, the researcher remained close to the participants and influenced how they interact with each other for learning and to generate outputs. However, as is consistent with Coghlan and Brannick's approach, the researcher does not influence their interpretation of what the interactions mean. They are there to collate the data and discuss it, but not influence the content of it.

There are also elements of criticalist approach in this research as the interactions between the participants in the workshops conversations impacts their impression of the concepts they are being exposed to. Critical theory focuses on connections between politics, values and knowledge and explores the deeper significance of these that a positivist or scientific approach views as being too subjective to be recognised as "fact." A criticalist investigation attempts to determine how the relationships between the actors and their social filters impact the social interactions and their outcomes (Alvesson & Willmott 1988). In contrast to the stark rationalism of positivism, critical theory incorporates social theory, philosophy and cultural critique to orientate practice and discourse towards the understanding of political interactions between the players (Best & Kellner 1991). Habermas (1974) created foundations of the criticalist approach by identifying how different forms of knowledge-domains impact our interest and understanding of our reality in different ways. That is, the empirical-analytical category of knowledge provides us with a fact based approach that enables relatively predictable outcomes. However, by contrast, the other categories are more based on social aspects of how humans understand their own identity and interactions with others, which impacts how they view the world.

Habermas indicated self-reflection into these subjective areas increases the richness of insights and conscious awareness of our reality in a way that pure analytical approaches do not. The power of reflective practice and personal development were strong themes of the research of Schön (1995) and also Raelin (Raelin 2001; 2006), who highlighted how it could be built into action research and action learning programs to develop leadership and professional development. Hodgeson and Cecmil (2006, 2008) highlighted how a critical approach would be useful to enhance the performance of projects and increase the level of professionalism in the evolving discipline of project management. This research was later supported by some critical research around the development of project management practices (Muzio et al. 2011).

In this research the key elements aligned with criticalist philosophy are:

- There is a need to recognise that the social interactions will influence the individual perspectives and that it is important to capture both individual feedback as well as group validation of the collated feedback. That is, the knowledge that is created as part of the process is inherently social.
- Participant realities (how they perceive the world) being influenced by social aspects of how the team members understand their own identity and interactions with others.
- Knowledge was socially created through the conversations the participants engage in to understand and draw meaning from the new concepts they are exposed to through the research. Understanding of the rich metaphors and how they can be applied is enhanced through social engagement and exchange of interpretation.

The ontology and epistemology combine to describe the *what and how aspects* of the research approach and the fundamental principles through which it is interpreted. However, there is another aspect of philosophy of this research which is also important: *Why is it being done?* The purpose (or *why aspect of the research*) can be captured by defining the axiology which considers the values, purpose and ethics of the research (Mingers 2003). Heron and Reason (1997) divide axiology into two categories: theoretical research for the sake of understanding (after Aristotle) and

applied research to inform praxis and create value through positive change. This research is clearly in the applied school in every aspect. It seeks to create new knowledge for the participants and enable them to use this knowledge in their workplaces so that they perform better (and perhaps elsewhere, such as in their personal lives - although no attempt was made to assess this option).

Table 3.1 shows how the research category terminology can be confusing in complex and subjective situations where every effort is made to maintain the complexity and gain meaning for this rather than (as in a positivist ontology/epistemology) attempt to simplify what is being studied to a few “controllable aspects”. The reality of this research is that humans function in a world that cannot have different aspects of their lives just switched off whilst others are allowed to continue functioning as if they were still there. Everything impacts everything else, making a repeatable “controlled” experiment impossible. Humans learn continuously, so the experience for participants is different each time they engage in an activity, even if only at the subconscious level - one cannot easily unlearn what one has learnt already and as a result the approach to the same situation second time round is inevitably different. Therefore if a social learning situation is repeated, the outcomes would be expected to be different, whereas in a positivist experiment the expectation is that a repeat outcome is necessary to “prove” the result.

3.5 Research methods

The overall methodology used is Participative Action Research supported by qualitative methods of semi structured interview, survey, reflections (diary short form) and focus groups (for validation of findings). The subjective nature of this research relies on qualitative data as foundation of interpretations from the participants themselves, which in turn generate the research insights and learning outcomes. However, to build in additional rigour, multiple sources of data were used, including a range people from each of four organisations across three action research cycles. Common themes were collated from the multiple perspectives and validated by allowing the source participants to challenge the statements summarising their inputs and the findings derived from them. As the same interventions and questions

were used in each of the cycles, some basic quantitative analysis of collated responses could be used which also helped to aggregate the data and present it in a more graphic form rather than just include words (for example, number of responses categorised as positive, neutral or negative for a question, percentage of respondents with a particular view and some survey questions had a semi structured scale). Such visualisation makes the data more easily interpreted by the readers of this material and therefore more easily communicated to a range of audiences.

Forms for each of the data gathering activities are shown in Appendix 4 and the process applied for the use of each method is discussed in the research design (section 3.6).

3.6 Research design

Three action research cycles involving a total of fifty-three participants from four different organisations (two organisations in parallel for the first cycle, then one organisation in each subsequent cycle) as well as input from eight other practitioners were conducted over a period of eighteen months (May 2010 to August 2011, for more details on these refer to Chapter 4). Learning from each cycle informed the subsequent cycles and adjustments were made to the emphasis and details of how the process was implemented, but not of the process itself or the fundamental objectives or questions being asked of participants. That is, the basic structure, process and intervention activities remained as originally planned, but the focus of the activities and time invested were altered to solicit better quality of data and to balance the attention between learning activity and research activity.

These cycles of research were also supplemented by gathering some reflections from practitioners who have engaged in the process of using metaphor in their workplaces.

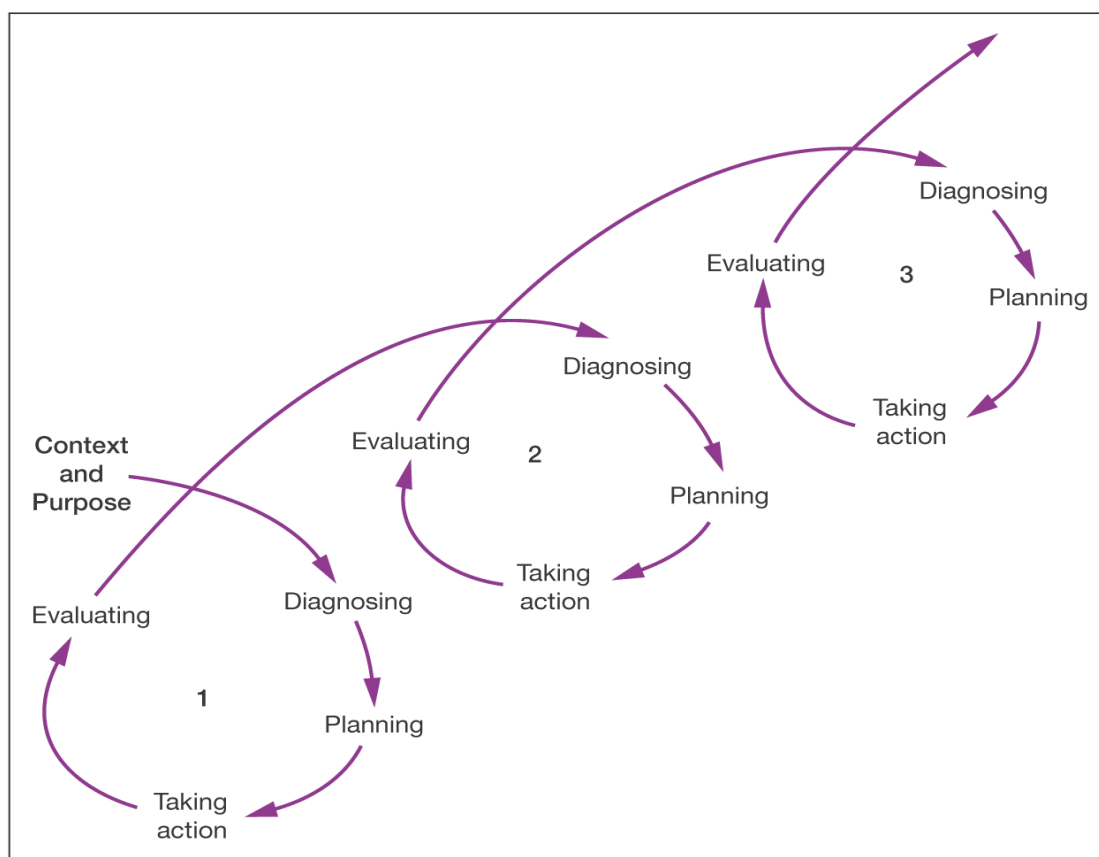


Figure 3.2 Action research spirals (Saunders, Thornhill & Lewis 2009)

Iterative cycles of research action and learning as shown in Figure 3.2 is typical in action research. This provides the environment to develop understanding and evoke change in the organisation as a primary output focus of the research, whilst at the same time create a learning experience for both participants and researcher alike. This journey of mutual learning and application of learning into the next cycles is a key outcome of the research and enabled the concepts to mature and generate richer insights to be drawn as the research progresses as is detailed in Chapters Five and Six.

3.6.1 Selection of organisations for research

Initially, organisations with significant project activities were identified and invited to participate in the research because the aim was to investigate relationships between people in an environment where the impacts could be observed in the short term. Projects were deemed to be the ideal environment for this as they are shorter term, temporary and involved people who are in the process of creating observable change, both social and other forms. Of thirty organisations invited, six initially agreed to participate and agreed that they implemented projects that were appropriate to the research. An appropriate project was one that would be

completed within the research timeframe, had at least three people on the team and involved some behavioural changes as part of the expected outcomes. A “key stakeholder” was identified in each organisation as the primary contact for all logistical arrangements and as the primary contact to the project team members. All interactions with the key stakeholder and team members were conducted in the organisations’ facilities.

However, when the time came to perform the research, four of these initial six organisations were not able to participate in the research due to a variety of reasons including limitations on resources, restructuring or no appropriate project at that specific time. The first two organisations were engaged in the first action research cycle and two additional organisations were engaged for research cycles two and three. Using the same interactions for the different organisations, enabled refinement of the intervention for the later organisations based on the early findings (a characteristic of action research). The research process within each cycle and organisation is detailed in Figure 3.3. It shows a multi-stage series of interactions with the teams, each building their level of knowledge of the metaphor characters and how they can be used in different contexts.

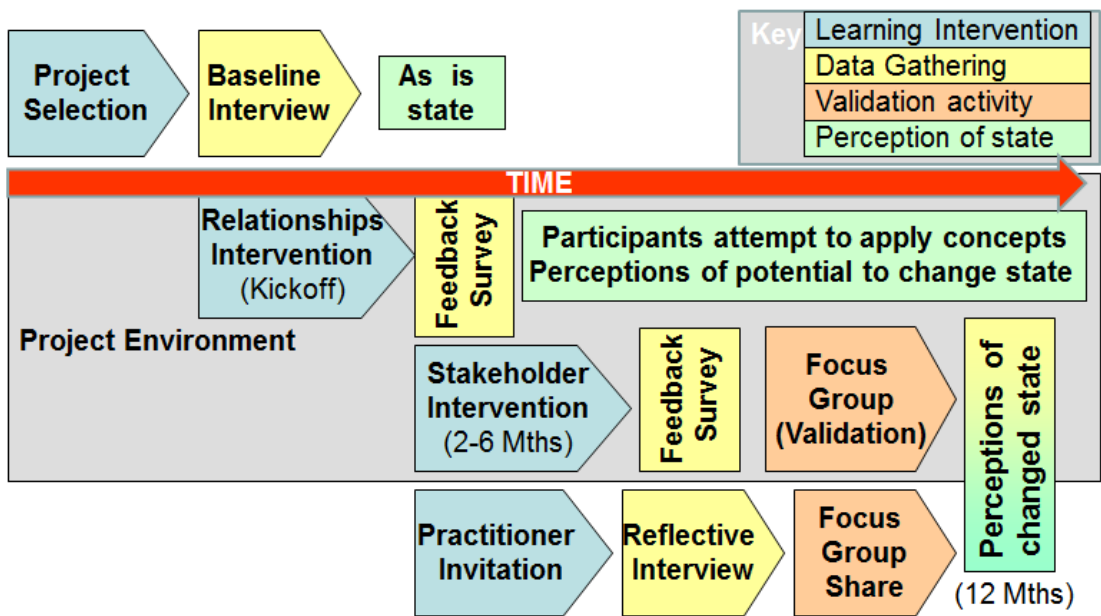


Figure 3.3 Flow of activities through the research process within each organisation

3.6.2 Participating organisations interventions: Each interaction was focused on a specific learning and research aspect that remained consistent across the four organisations, but each sequential interaction was different to others for the same organisation. The purpose and process involved for each interaction is detailed below.

3.6.3 Project selection: The selection of the project to be involved in the research was determined by the key stakeholder in the organisation (that is, the key organisation contact for the researcher). All logistical correspondence with project team members was through this stakeholder, but all data was gathered anonymously and directly from the individual participants.

3.6.4 Baseline interview: The background and level of experience of each individual participant was gathered through a semi-structured interview which also included their perceptions of the state of project management practice in the organisation. The researcher individually interviewed each participant asking ten questions about the nature of the organisation and their approach to project management. In research cycle one (Organisations A and B) interviews were voice recorded and additional notes taken. However, this was found to be superfluous and in cycles three and four, the participants were provided with a list of the interview questions and allowed to complete them ahead of the first intervention (saving time and providing more usable data). This information was gathered to generically profile the group of people involved in the research and also to define the organisational environment. To ensure anonymity each person was allocated a code that no one else knew, including the researcher. They selected a “person number” by taking a folded slip of paper at the time of their interview which was then used on all feedback they submitted for throughout the research program. This number allowed anonymous traceability for each person’s submission across feedback opportunities whilst protecting their identity at all times. Together this information provides a professional context as well as provides some insights into the organisational culture through the perspectives of those directly involved in the research. Baseline interview questions are provided in Appendix Four and aggregated responses are provided in the case study profiles in Chapter Four.

3.6.5 Relationships intervention: This was the first group interaction between the project team members on this project. First participants were introduced to several research instruments (refer section 3.8) including the Organizational Zoo metaphor characters through a quiz, Conversations That Matter, the Reflective Performance Cycle model and a series of behavioural interactions using the Organizational Zoo character cards to demonstrate how the metaphor could be applied in their organisation. They were asked to profile the behaviour of their own team in multiple groups (data which was collected as part of the research). At the end of this intervention, a short survey was completed by the participants on their perceptions of how these methods might be used by them in their organisations. They were also provided

with a Reflective Impact Dairy template (see Appendix Four) to record the outcomes of any attempt to use the techniques.

3.6.6 Stakeholder intervention: To open this session an open conversation was facilitated by the researcher about the characteristics of the group, based on the aggregated information from the prior interventions (survey, group profile and baseline interview questions). This was used to stimulate conversations about how this information might be used by them to better understand themselves, before they started to reflect on the behavioural profiles of stakeholders of the team. To supplement this self-awareness, participants were asked to perform an on-line metaphorical behavioural profile before attending this second workshop to further familiarise themselves with the characters and how they might apply to their own environment. These profiles were discussed in the group to understand the behavioural diversity of the group. The Organizational Zoo character cards were used by the participants to profile the behaviour of nominated stakeholders and to stimulate conversations about the perceived differences between them and the team. The researcher facilitated open conversations about the diversity of perspectives of the stakeholders, perceived mismatches between the stakeholder and the team profiles, how they might adapt their behaviour to engage more productively with the stakeholder. A feedback survey to gather their reflections on the dialogues was provided and collected before they left this intervention. Again, they were encouraged to attempt to use the techniques and record both planned interactions and the outcomes from them in the Reflective Impact Dairy template (see Appendix Four).

3.6.7 Validation focus group: All the participant feedback and intervention outputs were collated by the researcher and summarised into a series of statements. Some were simply themed collations of the quotes and survey responses, some as counts of participant comments fitting into categories and some proposed as draft researcher findings. These statements were provided in written summaries to each participant, as well as projected on the screen to facilitate an open dialogue in a focus group to confirm and validate them. It was possible for participants to add, adjust or remove any statements during this session through comments they recorded on their feedback sheets which we handed in at the end of the session.

3.6.8 Independent final interview: A final interview was performed with a stakeholder not directly involved in the research activities several months after the research interventions were completed with the team. These interviews were an attempt to get an independent validation of the impact the new concepts were having on the organisation and also to provide

an independent validation step or triangulate the data. The interviewee was nominated by the key stakeholder as someone who would be interacting with the team members involved in the research and they are asked to reflect on any changes they observed on the team dynamics and stakeholder relationships.

3.6.9 Practitioner invitation: An alternative source of data was available through a group of practitioners who use the same metaphor methods in their own organisations or consulting practices. Unlike the organisational participants, these practitioners had prior exposure to the techniques through a voluntary peer networking facilitated by the researcher. The key difference between this group and the organisational group is they had of their own choice adopted the techniques in their practice. They were asked if they were interested to provide a reflection on how they use the techniques and what outcomes and value they were able to achieve with them. Data was submitted by five practitioners in the form of Reflective Impact Diaries (see Appendix Four). These practitioners were gathered through a focus group to discuss their reflections and share their experiences through voluntary monthly network meetings. Reflections and insights from these meetings have been gathered as supporting data.

3.7 Case organisation

This research is based on the observation of behaviour in team environments in four separate cases, each representing a different organisation (with no knowledge or dependencies of each other). The organisational profiles and details are given in Chapter 4. Organisations are designated only with an alphabetical code known to the participants within that organisation and the researcher to protect the identity of the organisation and participants were identified only by a number as described in the methodology chapter.

Organisations A and B were involved in the initial action research cycle, Organisation C in action research cycle 2 and Organisation D in the third and final cycle. Learning points that emerged from the earlier cycles were embedded into the approach taken for subsequent cycles as is normal for action research (Coghlan & Brannick 2010). Participation of individuals was voluntary and most participants participated in all activities within their organisation during the research. Although not every participant answered every survey question or responded to every opportunity to provide input, the majority provided responses to each opportunity providing a sound basis for multiple inputs and validation of data.

3.8 Research instruments

The instruments used in this research have been discussed in detail in the research design and examples of the formats are provided in Appendix Four. In many interactions with the research subjects, these tools were used interdependently. For example, interactive workshops were based on conversations that matter structure and used the metaphor character cards of *The Organizational Zoo*. Those uniquely created for this research are marked with an asterisk*. Further commentary on how these may be useful for wider research and project management practice is made in Appendix One: New contributions to the body of knowledge.

In summary the instruments include:

<i>Semi-structured interviews</i>	Defined questions for baseline interviews and validation processes.
<i>Interactive workshops</i>	The key instrument of this research are workshops stimulating interactions between the participants and facilitating them to reflect on their own behaviours and the behaviours of others.
<i>Conversations that Matter</i>	A defined structure for conversations that highlight the need to consciously determine the purpose of the conversation and identify outputs, outcomes, benefits and beneficiaries (Shelley 2009). It is used to make the conversations richer and create more common understanding between participants. This conversation structure was used continuously and consciously through the workshops and in other research interactions.
<i>Reflective Performance Cycle*</i>	An action planning and decision guide model that evolved through the process of doing this research (in cycle 1). The model combines reflective practice, behavioural assessment, context and metaphor to assist understanding what type of conversation to engage in in different contexts. For example, it aids knowing when to stimulate divergent (open) conversations to generate options and when to trigger convergent (analytical and closing) conversations.

<i>Survey questionnaires</i>	Defined questions and freeform comments for collection of feedback on research interventions, experiences and research questions.
<i>Impact Reflection Diary*</i>	A predefined template to gather and format reflections on either planning a metaphor based interaction prior to doing it or reflecting on an intervention after having done it.
<i>Metaphor Character Cards</i>	A deck of playing cards using the Organizational Zoo (Shelley 2007) metaphor characters. These were designed to play games that stimulate constructive conversations about behaviour in specific contexts. Where cards were used photographs of the outputs were taken and in some cases subsequently aggregated into histogram like lists to show the frequency of various selections to profile the most common behaviours observed.
<i>Metaphor behavioural profiler</i>	Although not formally used to gather data, this on-line tool was used to assist the participants to explore the metaphors (Shelley 2008).
<i>The Organizational Zoo</i>	A comprehensive set of metaphors designed to collectively represent the most common behaviours observed in organisations (Shelley 2007). Each behaviour is represented by an animal (or one plant) and the overall behavioural environment represented by the collective of the animals in the “Zoo” (the organisation). As this is a unique instrument not previously used in research, it is described in greater detail below. It should be noted that this research was not designed to “prove” this specific metaphor as a tool. This is an example of a detailed metaphor that was selected to highlight how metaphor more generally can be a stimulant for conversation based interactions in team environments.

The Organizational Zoo metaphor characters (Shelley 2007) were created for the purpose of understanding human behaviours and stimulating constructive conversations about the interactions between them. This model consists of 26 metaphoric characters (25 animals and one plant, one for each letter of the alphabet to make it easy to remember) and is described in detail in the research instruments

section. Each character represents a behaviour, not a person as a whole, representing a significant shift from most behavioural profiling tools.

The *first key point of difference* compared to other profiling tools is it recognised that a person displays different behaviours in different contexts, making it difficult to use a generic categorisation tool for the “whole person” to accurately describe them in all situations. Successful people display a range of behaviours within a context, thereby demonstrating behavioural agility to suit the context. Those who are not able to adapt their behaviour to be appropriate to the situation they are in, tend to be less likely to rise through the organisation to senior roles.

The *second key point of difference* to support the Zoo metaphor approach over other profiling tools is that it intuitively demonstrates the interactions between the behaviours, which other tools do not. It is clear to most lay people what will happen between the animals when they interact. For example, when a lion and a mouse are together, either the mouse does not get noticed as it scurries away or the mouse gets eaten. Even the average child could tell you this. By comparison, very few people would be able to describe what happens when an INTJ interacts with ESTP (using MBTI profiling, see section 2.5) or when a 3,3,2,1 and a 1,2,3,3 interact (using HBDI profiling, see section 2.5). Doing something intuitive with a Hogan profile (as good as they are) with people with no training is next to impossible, because of their complexity. It is the intuitiveness of the Zoo metaphor tool, at both individual behaviour level and at the level between actors, that makes it much more usable for project teams - who usually have limited expertise in psychometric profiling techniques or psychology.

The *third key point of difference* is that the Zoo metaphor encourages the participants to make conscious choices about how to behave, rather than react subconsciously to the environment around them. The interventions used actively seek to combine reflective practice (both looking forward to plan most appropriate behaviours and reflecting back on observed behaviours) with the simplicity and richness of the metaphor to leverage the existing knowledge of the participants. There is no new language or jargon to learn and most of the characters are recognisable by most

professionals. The characters that are not commonly recognised represent the behaviours in the organisation that are not as obviously observed or understood.

Collectively the characters represent most of the common behaviours observed in organisational contexts. They were designed to characterise behaviours displayed from the most senior down to the most junior positions, as well as the most passive through to the most aggressive styles. The descriptions are deliberately in an informal style and represent the most extreme versions, as this makes a greater impact and stimulates richer dialogue. The benefit of this approach is more fun (providing people feel safe) and greater engagement for participants in a fun way. As with any powerful tool, such as a fast car or electricity, it can be positively used to great effect, but if poorly managed it can cause great destruction. As such, the facilitator needs to manage the situation with care to ensure constructive use of the tools.

The beauty of the Zoo metaphors is they are intuitive and applicable across cultures. Most people have some exposure to most of these animals and have a fairly common interpretation of them. The less well known animals in the list represent the less well known behavioural types and as such warrant a little thought to recognise in the organisational environment. Table 3.2 lists the characters and the key points associated with them, but reflect the most extreme version of them. Considering what “is” about these behaviours is generally quite easy. However, what is often more insightful is considering what “is not” typical for them. This reflective process encourages us to explore at a greater depth than we normally engage in and often brings out insights that would not have been highlighted without deploying conversations steeped in the metaphor. Any person can display any of these characters, but of course people are more likely to be specific ones in specific contexts. For example, the eagle in the board room may well be the social gibbon at the office party and the lion when sponsoring a tough project and yet a lazy sloth at home. This pattern of behaviours may work for some but not others, depending on their role and desired outcomes. The more we understand our own preferred styles and the styles of others, the more effectively we can improve our own performance and positively influence others. You may not enjoy being a lion, preferring a more subtle collaborative approach, but you need to be able to bring out the lion at times to

prevent being taken advantage of when it is important or when it is critical that your position be heard. Aggression is not bad per se, but it can be badly used or overused. Successful and popular leaders understand this and smoothly switch between animals (behaviours) with agility and finesse.

Table 3.2 Organizational Zoo Characters with primary characteristics

Character	Behaviour Tagline	Is	Is not
Ant	Basic hard worker	Hardworking, loyal, dedicated, territorial, instinctive	Sensitive, thinking, logical, decisive, individualistic
Bee	Knowledge workers	Hardworking, collaborative, communicative, territorial, knowledgeable	Self-aware, individualistic, gullible, political, reflective
Chameleon	Two-face “yes person”	Cunning, manipulative, weak, political, intelligent	Loyal, trustworthy, consistent, confident, challenging
Dog	Loyal follower	Loyal, trusting, enthusiastic, boisterous, gullible	Careful, serious, reflective, thinking, streetwise
Eagle	Inspirational leader	Visionary, strong, focused, inspiring, confident	Procrastinating, shy, weak, reclusive, emotional
Feline	Look at me	Individualistic, agile, aloof, vain, selfish	Sociable, friendly, communal, caring, collaborative
Gibbon	Centre of fun	Happy, playful, energetic, highly sociable, cool	Careful, serious, productive, forward-thinking, focused
Hyena	Pack task ambushers	Aggressive, scheming, controlling, manipulative, communal	Trustworthy, caring, considerate, intuitive, shy
Insect (beneficial) Yucca moth	Trusted advisor	Helpful, resourceful, positive, forward-thinking, collaborative	Selfish, arrogant, ubiquitous, procrastinating, slow
Insect (pestiferous)	Outside intruders	Arrogant, ubiquitous, ravenous, self-interested	Beneficial, trustworthy, caring, productive, shy
Jackal	Elite guards	Territorial, zealous, social, aggressive, controlling	Patient, tolerant, shy, reclusive, caring
Kid	New recruit	Naïve, playful, energetic, motivated, expendable	Experienced, reliable, knowledgeable, tough, streetwise
Lion	Aggressive leader	Strong, powerful, aggressive, controlling, territorial	Dedicated, hardworking, caring, shy, emotional
Mouse	Productive back office worker	Agile, productive, economical, reliable, adaptable	Lazy, extroverted, self-centred, aggressive, emotional
Nematode	Lazy parasite	Dependent, invisible, lazy, self-centred, parasitic	Productive, friendly, considerate, communal, beneficial
Owl	Eternal mentor	Wise, dedicated, helpful, intelligent, respected	Lazy, extroverted, self-centred, ambitious,

Character	Behaviour Tagline	Is	Is not
			aggressive
Piranha	Aggressive gossipers	Aggressive, ravenous, dangerous, selfish, frustrating	Friendly, trustworthy, approachable, happy, trusting
<i>Quercus robur</i> (Oak)	Endangered philanthropist	Knowledgeable, decisive, intelligent, experienced, stimulating	Selfish, disinterested, lazy, emotional, aggressive
Rattlesnake	Noisy politician	Political, sharp, defensive, reactive, insecure	Sincere, trustworthy, loyal, trusting, pleasant
Sloth	Sleepy hermit	Slow, weary, minimalist, submissive, lazy	Sociable, agile, enthusiastic, productive, busy
Triceratops	Resistant dinosaur	Weary, pessimistic, change averse, xenophobic, reclusive	Visionary, adaptable, collaborative, open, opportunistic
Unicorn	Mythical perfect manager (not real)	Believe they are: perfect, visionary, open, honest, collaborative	Project they are not: arrogant, aloof, ambitious, frustrating, insecure
Vulture	Gleeful undertaker	Nasty, opportunistic, scavenging, self-centred, dangerous	Benevolent, trustworthy, happy, collaborative, brave
Whale	Cool techno dude	Intelligent, inspirational, knowledgeable, powerful, social (with Whales)	Adaptable, aggressive, lazy, arrogant, competitive
X-Breed	Multi-talented hybrid	Arrogant, ambitious, busy, extroverted, educated	Experienced, trustworthy, tolerant, patient, caring
Yak	Bull at a gate	Boisterous, enthusiastic, tactical, friendly, frustrating	Careful, patient, experienced, considerate, modest
Zoo Positive	Great organisation	Welcoming, friendly, diverse, open, inspiring, playful, pleasant, productive, respected, balanced, social, stimulating	A place you want to leave (typically workplace, but can be any environment where people interact)
Zoo Negative	Disengaging organisation	Political, territorial, negative, backward, divisive, frustrating, change averse, manipulative, nasty, procrastinating, dangerous, draining	A place you want to stay (typically workplace, but can be any environment where people interact)

The philosophy of the Organizational Zoo is the culture of your zoo (organisation, team, club or home) is dependent on which animals you have, where they are in your hierarchy and how they interact. Too much dominance of any type is likely to lead to an unbalanced environment and like the real world environment, unlikely to be sustainable. Organisations, as with individual people, that have a diversity of animals and manage to display them in the right settings in balance with the surroundings are more likely to be successful. That is, the more adaptable a person or organisation can be with behaviour, the more likely they are to succeed.

Context is critical to success. People behave differently in different contexts and with different people. This is why we need to be able to “read” the behavioural environment and understand the behavioural dynamics in order to act appropriately. This does not suggest we should not be true to ourselves or our inner values. It is natural for most people to behave differently when in different situations and with different people, the key message here is to consciously decide how to act rather than reacting to the environment. This conscious choice makes a big difference to outcomes and your ability to get what you need (or desire) rather than being influenced (or forced) to accept what others want.

You need to understand who you need to be in what situation. Perhaps you may be primarily owl, gibbon, yak and bee at home with family. However, it seems appropriate to adjust when with senior management to demonstrate more submissive and professional traits such as mouse or dog. It may also be appropriate in a difficult decision making forum to display more aggression or power through lion style or perhaps be the inspirational eagle to lift the team. The animals used will to a large extent determine the success of the outcome. Displaying your best lion when in the presence of other lions is more likely to cause issues because of the territorial nature that characterises lion behaviour. It may be more productive to show non-territorial aggression through being a hyena to command respect without the territorial aspects.

The key point is that behaviour is (or should be) a conscious choice. Successful people decide how to behave to optimise their interactions. Those who don't make conscious behavioural choices (ideally before they engage, with some knowledge of

the behaviours of the others involved and the likely outcomes) are driven by the environment rather than managing it to deliver what they need. The discussions using the Zoo metaphors highlight these interdependencies and as such helps people to leverage their behaviours more effectively. It is not about right and wrong behaviours, it is about matching behaviours to contexts.

A range of practical interactions have been developed for corporate and government workshops since 2006. These have continued to evolve to suit new situations and have benefited from experiences of many implementations with a wide diversity of groups. Some of these interventions are described below to give a sense of what can be achieved using metaphoric techniques. They combine simplified behavioural profile methods with rich animal images and games to make the interactions safe and engaging. Stakeholder relationships, team dynamics and communications were selected as the most widely applied examples of these metaphor based methods. Research into these techniques is ongoing through the research and practice of the author and through a group of interested practitioners collectively known as The Organizational Zoo Ambassadors Network.

3.9 Triangulation of data

Triangulation is a process to enhance the researcher's confidence in their data to reinforce that data is robust (Richards 2009). This can be done by incorporating different perspectives of the qualitative data and also through by seeking data from a variety of sources. In this study the triangulation was achieved by asking the same questions of each of the participants in each of the four case organisations and also categorising their responses (introducing a semi-quantitative aspect to the data). Copper and Schindler (2011, p. 183) stated *"Many researchers recognize that qualitative research compensates for the weaknesses of quantitative research and vice versa. These forward thinkers believe that the methodologies complement rather than rival each other."* The author of this thesis, having been directly involved in both types of research, agrees that combining qualitative and quantitative data makes this research more robust and relevant, thereby providing richer insights. Einstein seemed to appreciate this point also through his quote, *"Not everything that counts can be counted, and not everything that can be counted counts"* (BrainyQuote.com 2012).

The inclusion of multiple observers from different four different professional environments helps to overcome the potential biases of those involved in a single organisation. The fact that these organisations all have multiple research subjects and collectively represented a range of contexts (government, membership organisation, and corporate environments) assists with triangulation. Another layer of robustness is added by introducing the evidence gathered from the independent practitioners. These people were not involved in the research interventions, but chose to use the metaphor methods themselves. Although this of course means that they are more likely to be somewhat biased (through their prior self-selection of the techniques), it does provide another perspective on the effectiveness of the methods. In the discussion of results in chapter 6 it can be seen that the results were largely consistent, highlighting that the triangulation efforts supported the robustness of the data and collection methods.

3.10 Chapter Summary

The philosophical approach described in this chapter helps readers to understand on what basis and foundations the research was conducted and how the data is being interpreted and applied. This chapter also describes the details of the research design and data gathering was performed in four organisations including fifty-three internal participants and eight individual practitioners working independently. It explains how the design and approach is consistent with the research philosophy and how this in turn drives the selection of the appropriate research methods and instruments to align with the research purpose. It has explained how action research is ideal for a qualitative exploration of human behavioural interactions in a project environment and how some semi-quantitative analysis can be used to aggregate some qualitative data to form trends that highlight important aspects of the research findings that will be discussed in Chapters Four and Five.



Figure 3.4 Word cloud for Chapter 3, visually demonstrating main themes
Details explaining the origin of this image refer to Figure 1.2 at the end of Chapter 1

Chapter 4 Case Studies

4.1 Chapter Introduction

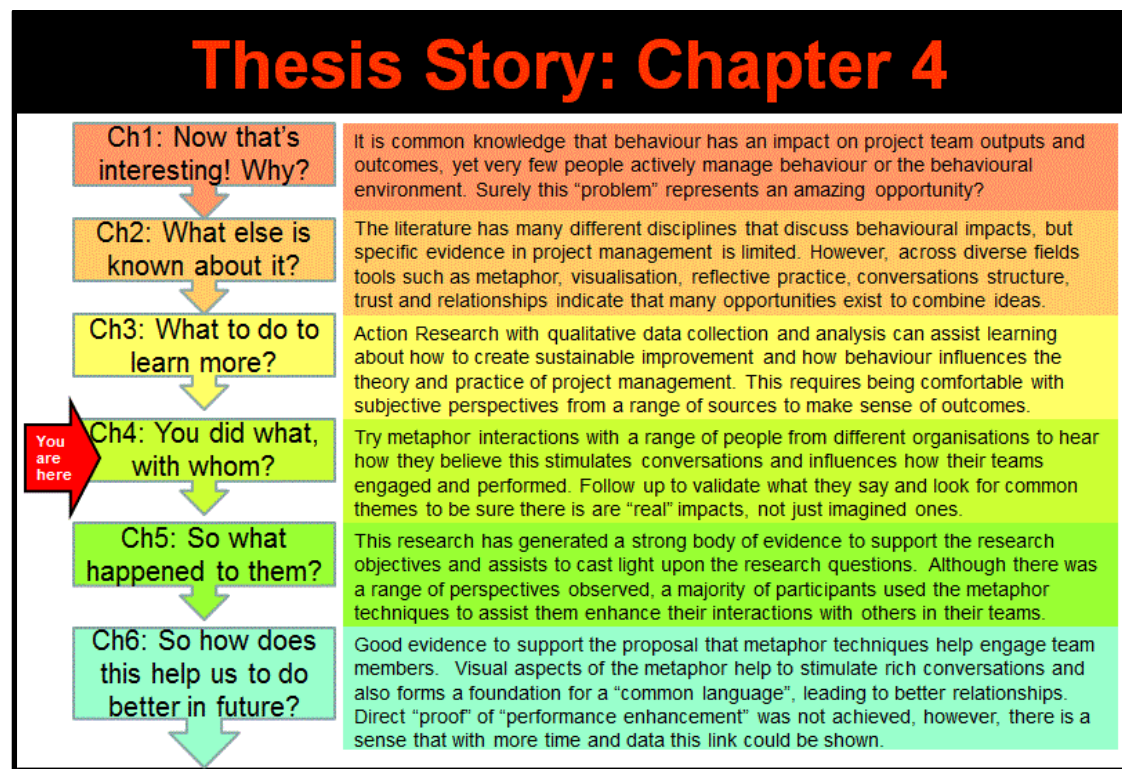


Figure 4.1 The story of this research: a flow through the stages of the research

This chapter describes the “action” part of the action research. It takes the plan described in Chapter Three and applies it across four volunteer organisations to generate reflections on how the metaphor impacted the relationships and dynamics of the team. Throughout the workshops a total of fifty-three people from the four organisations were involved in providing feedback on at least three occasions. In addition, eight professionals involved in using metaphor techniques as practitioners, provided a reflection on an instance when they used it and the outcomes they achieved. All participants were also asked to directly answer the three research questions and provide other information via survey questions. Collectively, these data sources constitute a significant body of evidence from which to collate common themes and also to seek and understand minority views which shed alternative insights on the interactions. This chapter provides the body of evidence to support the claims made in Chapter 5 and also to compare and contrast these findings with the academic and practitioner literature.

The four organisations agreeing to participate reflect a range of functions and cultures as is described in a brief profile of each organisation in the cycle they were involved with sections 4.2 to 4.4. Profiles provide context about the organisation, as this helps the reader understand their context and how they may perceive the use of the metaphor. However, the information also needs to be limited to preserve the anonymity of the organisations. After a general background on the organisation an “Internal perspective” is also provided. This information was collated from research participant’s answers to questions in the background interviews. In summary the organisations are listed below with their main purpose and will be referred to by just the letter designated to reflect the order they were involved in the research.

Organisation A: Commercial professional membership association (Cycle 1, 7 people)

Organisation B: Government legal services provider (Cycle 1, 8 people)

Organisation C: Corporate commercial services provider (Cycle 2, 12 people)

Organisation D: Government advisory services provider (Cycle 3, 22 people)

The individual practitioners come from a range of backgrounds including management consultancy, knowledge management, network management, social media, change management, information technology and the performing arts. This diversity was deliberately sought to solicit a range of perspectives and situations about how the metaphor influenced the team conversations and what impact this had. A brief profile of each practitioner is provided in Section 4.5.

4.2 Cycle 1: Organisations A and B

Organisation A is a commercial professional membership association engaged in providing members with services and benefits. This organisation has a membership in the thousands of individual professionals within a specific management discipline and has existed for several decades. It is well respected and very active in the provision of services to members including, professional development, advisory services, training programs, professional accreditation and information services. There were seven people involved in the research, which represented two small project teams. One project team involved three members implementing interventions

and training to enhance network interactions to support the development of virtual communities of practice. The other project involved three members developing and implementing system and process changes to enhance virtual learning. The seventh person was involved in both projects in a supervisory role.

As the first organisation actively involved in the research, the process was slower and less smooth than the other organisations. Compared to the other three organisations, there was considerably more time invested in explaining the research process, the ethics requirements, developing and refining the planned interventions and gathering deep data in the interviews. Although all these processes happened largely with the same activities in the later organisations, they were smoother and more focused. The interactions became more balanced between learning and research by providing more direct challenges to the research questions. Such refinements between cycles are a feature of action research, each instance of which is an emergent learning process in itself (Coghlan & Brannick 2010; Dick, Stringer & Huxam 2009; Etherington 2004). After the second intervention (stakeholder evaluation) with Organisation A was complete, but before the focus group data findings validation, interventions with Organisation B were commenced (with refinements from highlighted learning).

Internal perspective

(Summary of internal participant's responses from background interview)

The participants of Organisation A described their organisation as shown in Table 4.1 below. Each participant individually answered a series of questions in the baseline interview and the following table of data collated by the researcher. This provides an "insider's view" of the organisation by the actual research participants, thereby providing a much better perspective of their culture and a level of maturity that could not otherwise have been determined by the researcher.

Table 4.1 Summarised perspective of Organisation A (by research participants)

Question to Organisation A	Summary of research participant answers (answers compiled from baseline assessment, n=7)
Does your organization have a standardized project management method? If so what method is used?	7/7 Yes. Good awareness of the implementation of Prince II
What happens at the beginning of a project to get it started?	Quite different perspectives of what a “start” was. Most include a “Kickoff” meeting usually with team.
Are you aware of how project team members are selected and the selection criteria? If so, what is included?	2/7 clear on the process. 5/7 not aware or assumed informal.
What words would you choose to describe the organizations approach to managing projects?	3/7 Rigid, bureaucratic, ad hoc, risk averse, “frustrating but value adding” 4/7 Aspirational, flexible, positive, increasingly engaged, improving
How engaged do you think your organization is around developmental projects?	6/7 Positive feedback 1 “not very engaged”
How effective do you believe the organization is at successfully delivering projects? (on semi-structured scale Very poor to Excellent)	Mean= 5.2/10 Index. Lowest=3.9, Highest=7.0 3 members stated the immediate team more effective by 26, 16 & 6% (than rest of organisation)
Is there any aspect of your project methods that you would consider creative?	3/7 Not really, “Process over creativity”. 4/7 Idea stage, some positives
Is behaviour a factor that is actively discussed as part of routine team selection and development?	7/7 No, or not formally in teams. Sometimes perhaps in private/informal 1 stated HBDI is being used in some parts of the organisation for development purposes
Have you ever actively used metaphor based methods to stimulate conversations around behaviour or project development?	7/7 No

Does behaviour have an impact on project outcomes?	7/7 Yes, significant impact
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Organisation B is a government agency providing legal services to a wide range of government clients. They operate essentially as a response unit to requests for legal advice from government departments who have issues on which they need to seek legal advice. This may range from difficulties with occupants of government owned buildings, arguments with neighbours or other stakeholders around government facilities, claims for damages relating to government facilities or services, contracts and agreements for the purchase, lease or other use of government owned or leased facilities and services. The organisation has approximately twenty full time permanent staff and up to ten contractors depending on workload. Of these, ten people representing a team selected to implement a cultural change program within the agency were invited by the team manager to be involved in the research. Eight of the ten volunteered to actively participate in the research.

Internal perspective

(Summary of internal participant's responses from background interview)

The participants of Organisation B described their organisation as shown Table 4.2 below. Each participant individually answered a series of questions in the baseline interview and the following table of data collated by the researcher. This provides an "insider's view" of the organisation by the actual research participants, thereby providing a much better of perspective their culture and level of maturity that could not otherwise have been determined by the researcher.

Table 4.2 Summarised perspective of Organisation B (by research participants)

Question to Organisation B	Summary of research participant answers (answers compiled from baseline assessment, n=8)
Does your organization have a standardized project management method? If so what method is used?	Yes, 2/8 Maybe, 1/8 Low awareness of formal processes across the team. Significant differences between answers.
What happens at the beginning of a project	All different perspectives, little consistency, some contradictory views.

to get it started?	
Are you aware of how project team members are selected and the selection criteria? If so, what is included?	Don't know, 3/8. More informal than defined, 3/8 "Politically" 2/8
What words would you choose to describe the organizations approach to managing projects?	Unsure or too new, 4/8 Bureaucratic, ad hoc, risk averse, 2/8 Supportive, 2/8
How engaged do you think your organization is around developmental projects?	Supportive (with limitations) 3/8 "Not very engaged" (high turnover), less sure, or change resistant, 5/8
How effective do you believe the organization is at successfully delivering projects? (semi-structured scale)	High variation, even with individuals showing large range Lowest=2.5/10, Highest=9.0/10 Several showed wide variations depending on the project/stakeholders (making calculation of an average meaningless)
Is there any aspect of your project methods that you would consider creative?	No, 4/8 Some creativity, although all quite basic/normal, 4/8
Is behaviour a factor that is actively discussed as part of routine team selection and development?	Yes, 1/8 No, 3/8 Not formally/perhaps in private/informal, 4/8.
Have you ever actively used metaphor based methods to stimulate conversations around behaviour or project development?	Yes, 2/8 (method not specified) No, 6/8
Does behaviour have an impact on project outcomes?	Yes, 8/8 Significant

4.3 Cycle 2: Organisation C

Organisation C is a medium sized commercial service provider in the property management industry. They operate across the Eastern states of Australia and administer facilities on behalf of building owners. Their clients are mainly corporate property investors, but also range from large investment funds investing in property,

small businesses that own a range of buildings, through to individual real estate investors with private or commercial properties. The business is quite lean and client facing. They are heavily reactive to the requirements of the clients, who usually only contact them when they are unhappy with the service or there has been an issue to be resolved. Services provided include management of maintenance, complaints from neighbours or other stakeholders, administration of financial arrangements such as insurance, rates, provision of property inspections and annual reports and arrangement and hosting of annual meetings for body corporate services.

Internal perspective

(Summary of internal participant's responses from background interview)

The participants of Organisation C described their organisation as shown Table 4.3 below. Each participant individually answered a series of questions in the baseline interview and the following table of data collated by the researcher. This provides an "insider's view" of the organisation by the actual research participants, thereby providing a much better perspective of their culture and level of maturity that could not have otherwise been determined by the researcher.

Table 4.3 Summarised perspective of Organisation C (by research participants)

Question to Organisation C	Summary of research participant answers (answers compiled from baseline assessment, n=11)
Does your organization have a standardized project management method? If so what method is used?	No 5/11 "Yes & no" 5 Yes 1 Low use of formal processes
What happens at the beginning of a project to get it started?	All different perspectives, little consistency "Nothing" to meetings.
Are you aware of how project team members are selected and the selection criteria? If so, what is included?	No 1/11 Experience 5, Knowledge 4, Skills 3, achievement, personality, political, qualifications, strengths.
What words would you choose to describe the organizations approach to managing projects?	Rigid, not flexible, no risk, disorganised (2), not proactive, disastrous, lacking, ineffective, slow, ad hoc, laterally, non-existent, naive (but necessary), relatively good
How engaged do you think your organization is around developmental projects?	Don't know, low, trying-not achieving, energy-wrong way, too slow, occasional/regular, part open, active, engaged, formal
How effective do you	Lowest=3.2/10, Average 5.3/10, Highest=6.8/10

believe the organization is at successfully delivering projects? (% on unstructured scale)	Not much variation,
Is there any aspect of your project methods that you would consider creative?	No 4/11 Very logical, bit of both, at times, trying. Yes 7/11 Definitely, outside the square, engage stakeholders, creative, discuss & feedback, workarounds.
Is behaviour a factor that is actively discussed as part of routine team selection and development?	No 2, Yes & No 2, “When wrong” 1, “Sometimes/informal” 3, Yes 3: at all levels, team fit, mostly informal
Have you ever actively used metaphor based methods to stimulate conversations around behaviour or project development?	No 6/11. Yes 5/11
Does behaviour have an impact on project outcomes?	11/11 Yes “definitely”, negativity and positivity infectious

4.4 Cycle 3: Organisation D

Organisation D is a state government department providing services to internal and external clients across a range of industries. They have both a regulatory function as well as providing advisory services when consumers or trades people need assistance. In some cases they liaise as a mediator in disagreements or disputes to resolve them without resorting to formal legal proceedings.

Internal perspective

(Summary of internal participant’s responses from background interview)

The participants of Organisation D described their organisation as shown Table 4.4 below. Each participant individually answered a series of questions in the baseline interview and the following table of data collated by the researcher. This provides an “insider’s view” of the organisation by the actual research participants, thereby providing a much better perspective of their culture and level of maturity that could not have otherwise been determined by the researcher.

Table 4.4 Summarised perspective of Organisation D (by research participants)

Question to Organisation D	Summary of research participant answers (answers compiled from baseline assessment)									
Does your organization have a standardized project management method? If so what method is used?	9 yes, 6 stating yes named the “PM Excellence” program 									
What happens at the beginning of a project to get it started?	Number indicates frequency stated: 7: Project scoped 4: Choose/establish team members, stakeholder consult, create plan 3: Role definition, Meeting/Direction, Varies, Define objectives/needs 2: Project brief 1: Issue definition, Approval, Brainstorm 									
Are you aware of how project team members are selected and the selection criteria? If so, what is included?	Number indicates frequency stated 6: Expertise/relevant role 2: Skills required for project, area/field, capabilities, experience 1: Knowledge, availability, accountability, qualifications, project scope, stakeholder advice, word of mouth									
What words would you choose to describe the organizations approach to managing projects?	Consultative (3), organised (2), diverse (2), considered, methodical, deliberate, structured, formal, process-oriented, thorough, effective, sincere, productive, inclusive, satisfactory. Ad Hoc/informal (4), varies, not sure, cautious, disjointed, slow, needs clarity, scattergun, sometimes ambiguous, misses deadlines, confusing.									
How engaged do you think your organization around developmental projects?	Very engaged (4), focused, stakeholder aware, consultative, involved, project-oriented, satisfactory. Varies, patchy, “not very”, confused, getting better (from low base), sometime too consultative, “no comment”.									
How effective do you believe the organization is at successfully delivering projects? (semi-structured scale)	Clustered around Average (displayed as percentage of scale): <table border="1"><tr><td>Poor</td><td>Average</td><td>Excellent</td></tr><tr><td colspan="3"></td></tr><tr><td>Lowest = 40</td><td>Mean = 50</td><td>Highest = 75</td></tr></table>	Poor	Average	Excellent				Lowest = 40	Mean = 50	Highest = 75
Poor	Average	Excellent								
Lowest = 40	Mean = 50	Highest = 75								
Is there any aspect of your project methods that you would consider creative?	Brainstorming (2), Team workshops, seek range of creative inputs, marketing activities, social media, attitudes, metaphor, “not formally”. 									
Is behaviour a factor that is actively discussed as part	Informal, sometimes,									

of routine team selection and development?	some creative conversations	<table border="1"> <thead> <tr> <th>Response</th> <th>Count</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>14</td> <td>78%</td> </tr> <tr> <td>Yes</td> <td>4</td> <td>22%</td> </tr> </tbody> </table>	Response	Count	Percentage	No	14	78%	Yes	4	22%
Response	Count	Percentage									
No	14	78%									
Yes	4	22%									
Have you ever actively used metaphor based methods to stimulate conversations around behaviour or project development?	Fish, river, rock.	<table border="1"> <thead> <tr> <th>Response</th> <th>Count</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>17</td> <td>85%</td> </tr> <tr> <td>Yes</td> <td>3</td> <td>15%</td> </tr> </tbody> </table>	Response	Count	Percentage	No	17	85%	Yes	3	15%
Response	Count	Percentage									
No	17	85%									
Yes	3	15%									
Does behaviour have an impact on project outcomes?	Clarification - behaviour is not an issue in one research participant's immediate experience.	<table border="1"> <thead> <tr> <th>Response</th> <th>Count</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>1</td> <td>5%</td> </tr> <tr> <td>Yes</td> <td>19</td> <td>95%</td> </tr> </tbody> </table>	Response	Count	Percentage	No	1	5%	Yes	19	95%
Response	Count	Percentage									
No	1	5%									
Yes	19	95%									

4.5 Individual practitioner reflections

The limitation of doing this research just within organisations not previously exposed to metaphor based techniques, is that it takes time to develop understanding and capability of techniques. Therefore research participants may not have time to fully develop a sufficiently robust foundation required to apply it well. This has the potential impact of getting only a shallow understanding of what the techniques can do. Another reason to supplement the team members randomly involved for Organisations A to D with independent experiences from professional facilitators and trainers, is the base level of skills to effectively implement the techniques is higher in active professionals. So the addition of a group of professional trainers and/or facilitators was seen to add weight to the body of data gathered. The more advanced skills of such a group provide a different perspective on how they can adopt or adapt the metaphor based methods to apply in conversation based contexts. These professionals are better placed to use the techniques more effectively and also have more opportunities to use them in a range of different situations.

An invitation was posted to several on-line forums where professional trainers, coaches, project managers and knowledge managers were known to be active (including ActKM, Australian Facilitators network and KM4Dev). The invitations received responses from twenty-three parties expressing an interest in participating in the research. All were familiar with, or at least aware of, the use of metaphor techniques for training purposes, including five who had specific knowledge of *The*

Organisational Zoo methods. Only one had actively used the Organizational Zoo metaphor techniques prior to the research commencing. A face to face, email or telephone conversation was conducted to introduce them to the research, ethics standards, time frames and research objectives and occasional contact made with them through the research. No attempt was made to direct them in any way as to which techniques to use in what circumstances, although if advice was sought on options for specific situations such advice was freely provided. Over the course of the research, eight of these independent practitioners submitted both a reflection in Impact Reflection Diary and also answered the survey on the research questions. The practitioner reflections are summarised in Table 5.12 and shown in full Appendix 4 as the first eight examples. Practitioner answers to research questions are presented in Table 5.13.

It is important to note that none of the practitioners had worked directly with the researcher before this research and although two of them were familiar with the researchers work, none took any active role in the interactions with the case studies A-D. Most were not acquaintances of each other when the research started, but since the research has commenced they have all joined a small network of professionals organised by the researcher to share ideas on the development of metaphor based techniques to enhance professional performance (through specific attention to behavioural environment modification through conversation). This network continues to operate beyond the research and has a web presence.

4.6 Chapter Summary

The literature review in Chapter Three highlighted that although metaphor methods are often used in organisational contexts their application is only basic and somewhat disconnected. The research findings detailed in this chapter provides a foundation on which to support the research objectives. The data presented is both robust and relevant in that it is significant in volume and highlights a number of key themes as to why metaphor is an effective mechanism to engage team members around behavioural conversations. The data clearly shows that metaphor based interventions can be used in a constructive and connected manner to enable performance improvement in team environments. This chapter provides the data on which the discussion in Chapter 5 uses to support the research findings and assess against the academic and practitioner literature.



Figure 4.2 Word cloud for Chapter 4, visually demonstrating main themes
Details explaining the origin of this image refer to Figure 1.2 at the end of Chapter 1

Chapter 5 Research Findings and Interpretation

5.1 Chapter Introduction

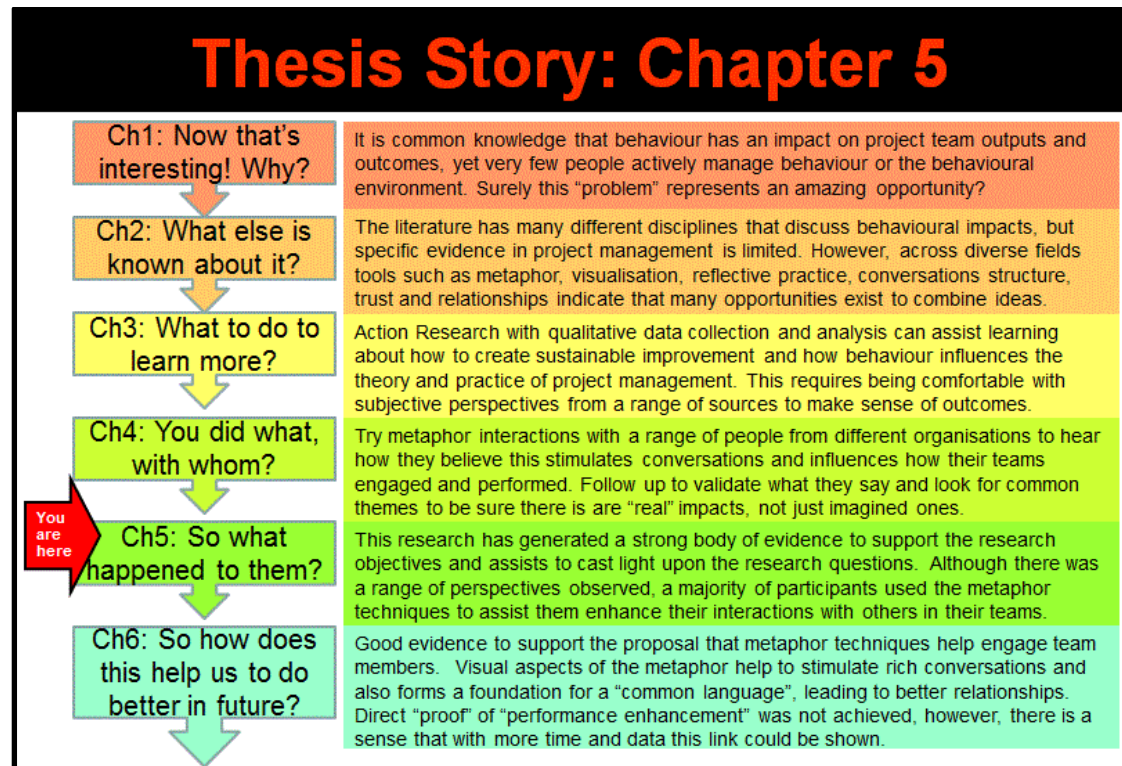


Figure 5.1 The story of this research: a flow through the stages of the research

This chapter seeks to make sense of the data created and collated in activities described in Chapter Four, within the philosophical approach defined in Chapter Three. The chapter describes how the data was handled and interpreted through iterative cycles to learn from the data and understand what meaning can be derived from it. This sense-making approach is described in greater detail in the chapter as are the findings of the researcher and how these are validated through reflection with the research participants. The chapter explains how a combination of quantitative and qualitative analysis has derived an optimal understanding as some data needed to be reduced to be best understood, whilst other aspects of the data was best retained in its complete form to draw out its meaning.

In a metaphorical sense this chapter is the engine room of the research. It is an effort-consuming mechanism that takes the data as fuel and churns it to extract the energy from it, in order to generate thrust for learning and the creation of new knowledge. This transformation is not a simple, single step process. In some cases, it requires iterative cycles to distil the essence of the data through reduction, mainly done by quantitative practices such as the summarising or “counting” of instances of specific items (such as how many of the reflections were positive). In other cases, it was a matter of gathering themes of “like” experiences described in different ways to enable subtle points of alignment to generate nodes of similarity to emerge from the data (such as observing that several participants from different organisations all mentioned that the metaphor acted as a framework or common language through which they could communicate common understanding of rich concepts). In other cases it involved noticing that only a single person made a specific comment and reflecting on why this person perceived the situation so differently from the others. All three situations are valid to use in developing a clearer understanding of the whole context. The fact that different people can perceive the same situation entirely differently is normal and rather than discount “outliers”, this research seeks to understand them as part of the larger social and behavioural context..

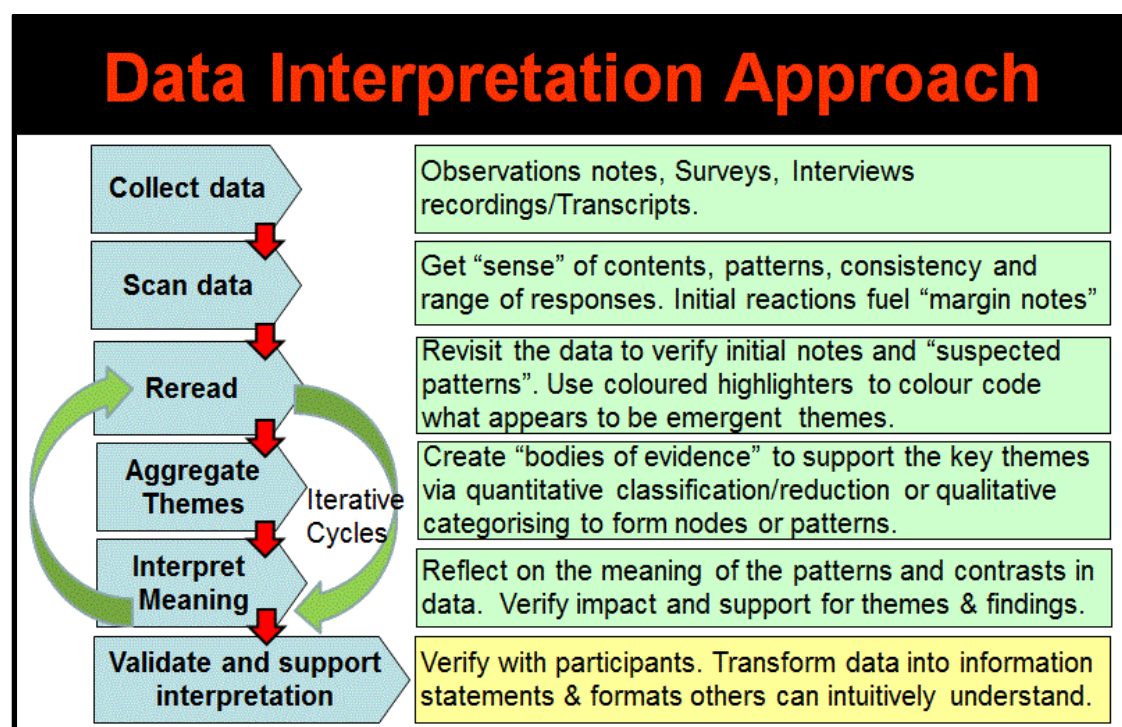


Figure 5.2 Data interpretation approach used in this research

Based on processes described by Bryant & Charmaz (2007) and Richards (2009).

In this research both qualitative and quantitative approaches were valuable in different circumstances and giving rise to different types of insights into what the data may mean. The general approach taken is shown in Figure 5.2 and draws upon principles from Grounded Theory (Bryant & Charmaz 2007), and those described by Richards (Richards 2009).

The validated findings from the three action research cycles performed in the organisations are tabulated in sections 5.2 to 5.4. Findings from the independent practitioners are recorded in section 5.6. Direct quotes taken from research participants are italicised, whereas summarised collated data and observations of the researcher are in standard font. A combination of both is highly valuable as different ways of handling the data bring out the key points more strongly. Sometimes to understand the perspective, it is necessary to explore deeply right down to the specific quote offered by an individual and other times a common trend around a point is more interesting and meaningful to generate understanding. Comments about each organisation follows the table of findings for that organisation and overall observations across organisations and from practitioners are collated at the end of the chapter in section 5.7.

5.2 Cycle 1: Organisations A and B

Organisation A

The team members from Organisation A were highly positive from the beginning and accepting of the research. There was one member who was sceptical of the methods, but was still engaged in the dialogue and offering a welcomed challenge to the others to provide a broader perspective. The group were highly professional in their approach and clearly had a common respect for the team leader. That said, they did not just accept what was discussed in the research interventions, they actively exchanged between each other to explore possibilities and challenge the concepts. This made the team an ideal candidate for this action research as they were genuinely interested to learn and at the same time were prepared to challenge.

Tables 5.1, 5.2 and 5.3 collate the data from Organisation A. These tables represent a combination of *direct quotes from the participants* and researcher observations or collations of data using quantitative analysis. The data are discussed at the end of this section to highlight key themes and learning points from this specific organisation. The participant quotes in Table 5.2 have been collated, by the researcher into three categories to support easier understanding of the general “feel” of the comments across the participants from this organisation. This classification was validated by the research participants in the focus group as the last activity in the research for this organisation.

Table 5.1 Validation of statements by Organisation A (in focus group)

Question to Organisation A	Summary of research participant answers (answers compiled from baseline assessment)
<p>Characterising your organisation.</p> <p>Summary of the organisation based on the collated feedback and observations by the researcher.</p> <p>Statement was discussed with research participants to validate it.</p>	<p>A collaborative group working in an evolving environment with a significant change agenda. The membership-based organisation has a generally positive attitude towards change and is implementing change on a number of fronts, including through the two projects being implemented as part of this research.</p> <p>The teams work effectively with good relationships across the two projects which have a balance of people, process and tools aspects. Although the organisation works in a largely left brained dominated industry, it is enabling some good people focused initiatives, especially through this team’s projects. Several initiatives using very innovative methods have been successfully experimented with to increase collaboration including the use of wikis, Yammer and Second Life.</p> <p>The organisation is reasonably conservative without being change averse and fits the profile of a well-balanced Zoo much more than an imbalanced one. Late in the research a restructure caused some stress and distraction for the teams in the study. The impacts of these changes may impact the team directly.</p>
<p>Do you believe the metaphor techniques impacted on your team interactions?</p>	<p>Three respondents “directly applicable” with benefits</p> <p>Three respondents “applicable” with stated benefits</p> <p>One respondent “Too early to be sure”</p>
<p>Did you apply any of the techniques in your work and if so, did it work well?</p>	<p>Yes 6/7 5 with positive outcome, 1 negative outcome</p> <p>No 1/7</p> <p>A comment made by several subjects was that deeper familiarity with all animals would be helpful to</p>

	application of the techniques and that this may come with practice.
What impact did the research interventions have on your views on how projects should be approached?	<ul style="list-style-type: none"> • <i>It impacted my views in considering stakeholder motivation and behaviour much more carefully rather than just project process and documentation.</i> • <i>Learning about the organisational zoo has opened up my view of how relationships can be conducted. Previously team-building and organisational activities have focused on what our preferences are and why we have them, but the organisational zoo has really shown that if we take an active view of our behaviour we can actually change it.</i> • <i>I think it's worth pursuing planning and reflecting on conversations that matter using the prescribed techniques. For me, the main project benefit is of control – I perceive I have more control over the project - that's what Prince2 project management describes as important – controlling the project.</i> • <i>I believe the focus should be on selecting the right people to the right project team and making a conscious project team effort to acknowledge and use the animals to position people's minds and the way issues are approached. I think people should be involved in the use of the metaphor technique rather than using it on them.</i>
Have your attitudes towards the use of metaphor techniques in project management changed? If so how?	<ul style="list-style-type: none"> • <i>They haven't had a major impact on my approach, but add to the technique that I can draw upon to gain approval and sway people's opinions. Reflection prior to meetings is probably the main difference to previous methods</i> • <i>I think that having this is useful as a common approach to language, stakeholder analysis and interactions. This caused me to think differently about people and the way they behave, and even separate the behaviour from the person somewhat.</i> • <i>The approach to conversation and the conversational framework is also important, particularly when the project is introducing a significant change or new way of working.</i> • <i>From a development and preparation perspective, the reflective process is beneficial for preparing for project meetings with stakeholders. It takes you out of the "acting and doing" and encourages more planning and preparation upfront.</i>
What are your reflections of the impact of the reflective practice, conversation, and metaphor model on	<ul style="list-style-type: none"> • <i>I wouldn't say my attitude has changed but I do like the idea of considering metaphor in project management when deciding on project roles (not the project team as much but the roles for people within the team), and then being aware of stakeholder</i>

<p>your own thinking and behaviour?</p>	<p><i>behaviour and being able to consider it and respond to it in a much more fruitful way. I do like that metaphor brings in cultural and behavioural ideas beyond just the project tasks, process and documents itself.</i></p> <ul style="list-style-type: none"> <i>• I think the metaphor technique is good way to identify behavioural traits in business and while I think that 25 metaphors might be a bit too many to remember off the top of my head, I have learnt to incorporate it into my thinking when undertaking projects. As I had never used it before in projects I'm not sure my attitude towards it has changed, but it has at least given me an attitude (a positive one!) toward personal behaviours within project teams, something I didn't consider much before.</i> <i>• Probably, because preparing conversations in detail doesn't necessarily mean the conversation will cover all the steps planned, or need to.</i> <i>• Definitely, I have never been aware of people's behaviour other than "easy to get along with" or "difficult". This has provided a great way for me to acknowledge and understand and see it as a manageable challenge rather than an extremely difficult obstacle.</i> <i>• Perhaps. It is a little early to tell, as the particular people and examples that I have been working with are still "works in progress". ...There are promising signs... useful interpersonal tool and framework for thinking...</i> <i>• It has certainly helped clarify my thinking around different types of behaviours in people and how to influence change. Having such a broad range of characters/metaphors to choose from is also helpful. That these metaphors have face to face names (rather than a letter or a colour ... insightful in developing an approach once you know which animal/s you are dealing with</i> <i>• This is the first time I have utilised the metaphor technique so any change is positive. After the first couple of months I am still enthusiastic about utilising the cards and discussing the technique more generally with colleagues.</i>
<p>Impact of the Reflective Performance Cycle model</p>	<ul style="list-style-type: none"> <i>• I have been doing much more reflection about the work and conversations, and also on the outcomes I want to achieve for work and myself. So these frameworks are highly useful in helping me clarify how to think about things- problems, issues, outcomes I want to influence.</i> <i>• I am finding this focus on reflection time is helping me cope better in stressful or challenging circumstances – and recover more quickly from incidents that affect me emotionally at work.</i>

	<ul style="list-style-type: none"> • <i>I quite like the technique and like it most useful for difficult conversations or influencing during meetings. My team uses the metaphor model all the time when talking about people we are having difficulty with. This has the dual effect of de-stressing the team through humour and being able to have a sensible conversation about tricky topics.</i> • <i>I have always been a big believer in reflective practice – however as this is often viewed as ‘nice to do’ it is one of the first notions to be dropped from the list when there are time constraints. This process reminded me of the value and benefit in reflective practice – that you get more benefit and value and better outcomes from it. In terms of the metaphor model – I appreciate being able to use the animals as a tool to consider my natural behaviours and the way I approach things and how I may need to adjust this as the situation and need arises.</i> • <i>I think I need more practice with the conversation model in order to reflect on it properly however I really like the concept and idea of it, I just need to master the implementation.</i> • <i>All experiences were recorded because they involved obtaining something from the stakeholder important to the progression and success of the project.</i> • <i>I think, as per my previous responses, the biggest impact this reflection has had on me is that it has re-enforced the attitude that behaviours are malleable. While our day-to-day behaviours are a product of who we are, our behaviours in meetings should rather be a product of what we want to achieve.</i> • <i>The reflective practice helped me develop my understanding by thinking and reflecting throughout the entire process rather than just at the end. I found it really useful in applying the metaphor on myself to influence my behaviour rather than using it on others</i>
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Table 5.2 Organisation A research participant statements on benefits of metaphor (discussed in focus group to validate findings)

Typical supportive statements
<ul style="list-style-type: none"> • <i>The metaphor techniques are helpful in order to prepare for meetings and in understanding how/ why people react in particular ways within meetings. However unless you have the cards with you or know all the animals intimately it was difficult to use the metaphor techniques within meetings. They were primarily most useful for preparation or reflection purposes (and especially if you have the cards in close proximity).</i> • <i>I believe that the metaphor technique is potentially useful as it opens my thinking</i>

about how people behave like they do. While traditional behavioural analysis identifies the preferences people have, I like how the metaphor technique acknowledges that some people will modify their behaviour to serve a purpose, and that the metaphor technique caters for this with optional remedies to suit each unique situation.

- I think certain members of the team [senior personnel names excluded] were able to use the metaphor technique more and more successfully due to the nature of their role and their familiarity with staff. Their positions hold a certain level of power and influence which when combined with the metaphors made their influence stronger and the results were successful.*
- The shared language of the metaphor (Organizational Zoo) I have found ‘de-personalises’ the situation and takes the behaviour into another realm. So you don’t so much see the person with the behaviour as a “problem”... enlightening to see the actual behaviour play out in the person with that behaviour...*

Typical semi-supportive statements

- The metaphor techniques are helpful in order to prepare for meetings and in understanding how/ why people react in particular ways within meetings. However unless you have the cards with you or know all the animals intimately it was difficult to use the metaphor techniques within meetings. They were primarily most useful for preparation or reflection purposes (and especially if you have the cards in close proximity).*
- While this preparation helped me to think clearly about what outcomes to aim for, I’m not sure there is evidence enough that the employed techniques produced the outcomes alone, autonomous of previous conversations and probably more importantly, conversations the stakeholder may have had with other persons about the project.*
- I think its most useful for identifying my own behaviour and how I may need to shift it (note shift not change) according to the circumstances to move toward the outcome I’m after. It is also good to identify particular behaviours in others and know how to approach them.*

Counter supportive statements

- I did see evidence however in a meeting where one of our team was actively attempting to be a lion in order to get specific decisions made and people to accept accountability/ responsibility for some future work. In my opinion it didn’t work – instead the team member came across as overly aggressive, rude and completely out for their own agenda only – and it certainly didn’t get the desired outcome with several other meetings required after the event to reach the decisions. So there is something in there about how people interpret animals and their characteristics and then translate this into their own behaviour.*
- The one area where I believe there may have been potential conflict is within team interactions where we are all aware of the technique. If during a meeting we do not acknowledge the behavioural change in one team member my mind tended towards trying to ‘guess’ what animal the other was trying to portray as their behaviours were noticeably different from normal.*

Analysis of reflections gathered (* see below for full explanation of measures)

#	Context	Planned	Expectation	Experience	Impact
		Impromptu 0	Less 0	Negative 0	Unhelpful 0
		Preplanned 1	More 1	Positive 1	Help me 0.5
					Help others 1

1	Ask forgiveness not permission	0.7	1.0	1.0	1.0
2	Technophobic stakeholders	0.4	0.5	1.0	1.0
3	Social media ownership	1.0	0.7	1.0	0.5
4	Unexpected restructure	0.1	0.5	0.5	0.5
5	Meeting decision making	0.1	0.5	0.5	0.5
6	New manager	0.2	0.5	0.6	0.6
7	Difficult team culture	0.3	0.6	0.5	0.5
8	Help to respond to forced change of role	1.0	0.9	1.0	0.5

* Each of the “measures” was taken from a semi-structured scale at the bottom of the reflection template and was self-tagged by the research subject at the time of writing the reflection (see completed templates in Appendix 4). The quantitative measure was recorded as an index of the scale (Zero on extreme left to 1.0 on extreme right) to the nearest 0.1.

Table 5.3 Validation of research question responses by Organisation A

(collated participant statements discussed in focus group to validate findings)

How is the stakeholder engagement process enhanced through the use of metaphor tools?
<ul style="list-style-type: none"> <i>It provides a framework where conversations and influence can be planned to ensure traits held by stakeholders can be utilised and exploited (in a good way) to achieve the best outcomes.</i> <i>Engaging stakeholders with the use of metaphor tools is enhanced as we can consciously portray the behaviors needed to get a positive outcome in projects. However the down-side can be if stakeholders in a project are also friends or colleagues outside of projects and these project behaviors come across as negative or “not being yourself”.</i> <i>Stakeholder engagement process is enhanced as better relationships are built and a better understanding of stakeholder needs, agendas and behaviours leads to a better project outcome.</i> <i>It helps ‘de-personalise’ behaviour and encourage better understanding of stakeholders, particularly those who have different styles and approaches than the project team – individuals and collectively.</i> <i>Through better understanding how to work with these metaphors and behaviours, outcomes desired by the project are more likely to be realised.</i> <i>People who might be seen as “blockers” or change resistant are better understood and therefore the team members using metaphor as a tool are more able to speak in the language of the stakeholders. Therefore their ability increases to change perceptions and influence change in the stakeholder’s thinking.</i>

- *Reflective practice provides the enhancement to stakeholder engagement. This part of the process allows some thinking to consider the approach you are going to take when meeting with stakeholders. It is especially useful in dealing with stakeholders who are important influencers within organisations. Reflecting on what has happened in the past and planning the next approach with the stakeholder ensures meetings are constructive and drive towards the outcomes you want.*

How can project team members influence outcomes more effectively by better targeting stakeholder behaviours?

- *I think they can influence outcomes more effectively through better targeting stakeholder behaviours. However, it does require a commitment to sufficient preparation in order to achieve the desired outcome and in the best circumstance a prior relationship or some knowledge of the person you are dealing with would assist greatly.*
- *I also feel the more conversant you are in the animal types and the more confident you are in identifying people's behaviours, and adjusting your own behaviour to meet the need the better the outcome – however I do feel this is/ would be quite labour intensive to begin with.*
- *Possibly by actively putting behaviours “on the table” in a meeting this could overcome the perception of “not being yourself”. If within a meeting we openly say, “I’m going to be a vulture now”, this will off-set negative feelings against a person.*
- *This way also, we can better target stakeholder behaviours because we collaboratively go through the behaviours without others knowing what mind games might be going on.*
- *I think keeping the metaphors in the conversation at all times helps to ingrain the way of thinking that is necessary. Team members should keep logs of behaviours so that all members can be prepared.*
- *Utilising the cards help focus on how we should go about planning for stakeholder meetings. Also allows us to talk about psychology of the individual and their underlying behaviours. Using the understanding we have of behaviours to construct the information we are delivering to appeal unconsciously to the stakeholder. You could almost say that we have an unfair advantage when entering meetings.*
- *Through using the language, words and orientation that resonates most with the stakeholder behaviours. They then feel more comfortable that you are “on their side” and understand them. This creates the environment for influencing outcomes.*

How does the team operate more effectively by using metaphor to help align roles or tasks to team members.

- *The team does operate more effectively as aligning natural behaviour preferences to tasks logically makes sense to get a better outcome. However, it is rarely thought of or implemented when putting together project teams or delegating tasks.*
- *Although we haven't actually undertaken a team meeting using metaphor as a labour-division tool, I think that we have sub-consciously divided tasks based on the innate behaviours and skills each team-member has. The behaviours attached to these tasks have been a product of the person it was delegated to, mostly based on skill and work-capacity.*
- *I think this is the best use - publicly acknowledging the behaviours and traits to*

put people in roles where they can perform their best and contribute to the project. Often this is not done and the wrong types of people are brought into a project.

- *We have used the cards on ourselves to see if we have any gaps or weaknesses in our team make-up. We are then able to take on roles more consciously that have, in the past, left our team in a vulnerable position. The good cop, bad cop routine can be used with the cards to move a meeting discussion around, from one person discussing the strategy (eagle) and another talking technical specifications (whale).*
- *There is a shared orientation and a way of working together to influence outcomes. A particular team member might be matched to a stakeholder that is best able to work that dominant behaviour type. I believe this is another way of “playing to people’s strengths” to achieve the work needed to be done.*

Validated “researchers conclusions” for Organisation A

- There is a growing body of evidence in Organisation A to support the proposition that “application of the Organizational Zoo metaphor based techniques enhances relationships within project teams and between project teams and stakeholders”.
- More specific examples gathered through the reflective impacts diary reports is likely to further strengthen this argument by providing tangible and intangible evidence.
- Overall there is strong support for, and use of, the metaphor methods and a willingness to continue to use them by most team members.
- The open-mindedness of the people involved and the experimental nature of the organisation was a contributing factor to the perceived success of the metaphor model.
- The proposed model combining reflective practice, conversations that matter (aligned with project context), behaviour metaphor and simulation/role plays enhances project performance through creating a richer understanding of complex interactions and better preparing the team members to deal with this (both in planning and during and after actions).
- Active use of the model and associated techniques helps to increase the flow of knowledge between team members and this makes a positive contribution to project outcomes and the relationships between the team members.
- Although hard evidence is difficult to obtain on such subjective interactions and outcomes, there is a strong perception amongst all members of both teams that application of these techniques does have a positive impact on project outcomes.

An independent final perspective for Organisation A

Six months after the final intervention was completed a senior manager of the team was interviewed about the impact of the research interventions (refer 3.6.8). His perspective was that the concepts introduced in the research had made a difference to the participants directly involved in the research and there was an observable difference in the way they interacted with each other and the way they engaged with stakeholders. He advised that a significant restructure announced at the time the

research was being finalised led to five of the several people involved in the research leaving the organisation within a short space of time. Of the remaining two participants who remained with the organisation, both continued to practice using the metaphor cards, albeit in a more informal manner than was done in the research project environments. Both projects in the research were placed on hold pending the finalisation of the restructure which was still being sorted out at the time of the interview. The manager stated they were interested in doing some more work with the metaphor once they had their new structure in place, as they felt it had the potential to deliver value in other projects. However, this would not fit within the time frames for this research. So the method was seen as having potential to be continued and there was a desire to continue its use amongst remaining research participants, but it was not possible to create a direct link between the application of the metaphor and long term behavioural changes, due to circumstances (the restructure) beyond the control of the research.

Researchers comments regarding findings from Organisation A

Overall, for Organisation A there was definitely a change in the mindset of six of the seven research participants in the way they approached conversation about behaviour and how they engaged with others in the environment. Informally touching base with each of these people around six months after the research indicated that they were all still using the metaphor techniques in a small and informal way. One person now uses them quite routinely to pre-plan interactions with stakeholders and stated this approach is generating useful outcomes for her.

Key themes emerging from the data in Organisation A

Organization A participants were highly positive about the use of the metaphor techniques for self- evaluation and evaluation of key stakeholders. They appreciated the nature of the games and the insights creative techniques enabled .

The reflections recorded in the last section of Table 5.2 show a very interesting pattern. The first three are very positive in their outlook and are typical of the open experimental culture present at the time the research started. However, once the

restructure was announced and the implications for the team became apparent, the topics of reflection changed dramatically. They changed from an environment of experiment and trust, where it was acceptable to make a mistake, into a place where you don't act until you know what will happen. The environment became more controlled and confrontational and resulted in most research participants leaving the organisation within a year. A strong point for the Impact Reflection Diary as a tool is that it was still being used to get positive outcomes for the team after the restructure as it helped them to resolve difficult issues in the deteriorating culture (from their perspective - refer to example nine in Appendix Four).

Organisation B

Organisation B had a very challenging and aggressive culture, both within the project team and also across the entire organisation. Consequences of this were significant, including having staff turnover across the organisation of almost one hundred per cent (that is, the number of people who left the organisation in the year in which the research was done was almost as high as the total number in the organisation). Not everyone left, but several positions were filled several times during this period. The nature of this organisation is usually transient, but at this time it was much higher than normal. The researcher and the key stakeholder were aware of this issue at the time of agreeing to conduct the research, but both considered it a significant challenge for the metaphor that would be useful to determine whether it could make a difference in such a difficult behavioural environment.

Tables 5.4, 5.5 and 5.6 collate the data from Organisation B. These tables represent a combination of *direct quotes for the participants* and researcher observations or collations of data using quantitative analysis. The data are discussed at the end of this section to highlight key themes and learning points from this specific organisation. The participant quotes in Table 5.5 have been collated, by the researcher into three categories to support easier understanding of the general “feel” of the comments across the participants from this organisation. This classification was validated by the research participants in the focus group as the last activity in the research for this organisation.

Table 5.4 Validation of statements by Organisation B (in focus group)

Question to Organisation B	Summary of research participant answers (answers compiled from baseline assessment)
<p>Characterising your organisation.</p> <p>Summary of the organisation based on the collated feedback and observations by the researcher.</p> <p>Statement was discussed with research participants to validate it.</p>	<p>The team acts more independently than as a team. People are allocated specific tasks for specific stakeholders to react to in a short timeframe and under political pressure to provide rapid responses. Stakeholders are quite aggressive and demanding, making the atmosphere quite stressful. It is difficult to build rapport with “clients” as they are often one off and need issues resolved rapidly.</p> <p>We are mainly engaged in resolving conflicts and the team is often the “meat in the sandwich” in that we are often seen as the enemy rather than the facilitator of the solution between the parties in conflict. This environment takes its toll on employees and contributes to the way we interact with each other and also contributes to the high turnover.</p>
<p>Do you believe the metaphor techniques impacted on your team interactions?</p> <p>See also statements in Table 5.5</p>	<ul style="list-style-type: none"> • <i>Yes, we are now having more interactions with each other. We can see the value of this happening and would have liked to done more, but time constraints prevent this.</i> • <i>Constant staff changes interferes with our ability to develop trust and relationships as well as adopt new methods.</i> • <i>Potentially - we are constantly on the run and do not have time to use creative techniques- maybe starting to change in some areas now.</i> • <i>The metaphor conversations in the workshop brought us together more effectively, but hard to get this to happen in the normal daily tasks.</i> • <i>Value can be seen, despite limited resources but we need greater opportunities to apply and improve use.</i> • <i>Greater understanding is necessary to use better.</i> • <i>Encourages discussion of negative behaviours - negotiation benefits.</i> • <i>Divorce person from behaviour helpful.</i> • <i>For the individual yes, but not the team.</i> • <i>Not until today- having positive conversations about metaphors has really helped.</i>
<p>Did you apply any of the techniques in your work and if so, did it work well?</p>	<ul style="list-style-type: none"> • <i>Subconsciously using the techniques, but would be better to use proactively and reflect.</i> • <i>Hard to get to know stakeholders well enough to be able to use metaphor to characterise them.</i> • <i>Not involved in projects, so unable to put into practice.</i> • <i>Reflections are good, particularly if a conversation went well or not well.</i> • <i>No- I have not applied any techniques. I honestly don't really think about it. I like the idea of it but just have</i>

	<p><i>other things to think about.</i></p> <ul style="list-style-type: none"> <i>No I have not had the opportunity to use the techniques in the workplace. I have been more reflective and more self-aware in my life outside of work and have these insights to assist me in the workplace.</i>
What impact did the research interventions have on your views on how projects should be approached?	<ul style="list-style-type: none"> <i>It was a change of perspective- from just being who you are to how you need to be to achieve your outcome.</i> <i>Reflection about divergent thinking versus convergent thinking in the RPC model useful for structuring the conversations and getting diversity of views.</i> <i>Thinking about using cards for job interviews and performance reviews.</i> <i>Reinforced that reflective practice is important</i> <i>Emphasised importance of behaviour and behaviour selection.</i> <i>The research intervention allowed us to consciously think about team dynamics, personalities, skills, attributes of each of the team members and how to utilise these to plan and implement projects.</i>
Have your attitudes towards the use of metaphor techniques in project management changed? If so how?	<ul style="list-style-type: none"> <i>Feel more well disposed towards whole concept after the second session.</i> <i>Yes, can see that relationships have improved since this workshop took place. Profile also likely to have changed (i.e. no Quercus here before).</i> <i>Use of animals has broken down barriers around talking about behaviours "fear behaviours". Further investigations would definitely assist. Team productivity and achievement of goals.</i> <i>Yes, I think it is a good technique if used properly.</i> <i>I have not had time to familiarise myself with the characters to be confident to use them in the work environment.</i>
What are your reflections of the impact of the reflective practice, conversation, and metaphor model on your own thinking and behaviour?	<ul style="list-style-type: none"> <i>I certainly reflect a lot more!</i> <i>I like the feel, think, do concept.</i> <i>Can see the value, mostly from an individualistic sense – use of tools in daily work life as opposed to team building (due to lack of corporate support).</i> <i>Picks up some behavioural characteristics of other training I have done in this area (management).</i> <i>It has made me consciously think about my team members and myself, our behaviours and attitudes and how we interact with each other.</i>
Which techniques did you use and comment on how effective they were?	<ul style="list-style-type: none"> <i>Character cards to assess stakeholders (with a positive outcome).</i> <i>Did not apply in this project, but now applying practices in several other projects.</i> <p>A general theme across the responses of insufficient time to apply- as can be seen in responses to other questions.</p>

Table 5.5 Organisation B research participant statements on benefits of metaphor (discussed in focus group to validate findings)

Typical supportive statements					
<ul style="list-style-type: none"> • <i>Use of metaphor does appear to make dialogue on behaviour easier.</i> • <i>Important exercise in order to determine the different elements/dynamics of a team and also the requirement of a team.</i> • <i>This helped give me a structured sense to myself and the people around me.</i> • <i>Thought provoking session.</i> • <i>Liked the discussion post-maze exercise.</i> • <i>I see how used for team selection, like to know more about engaging stakeholders.</i> • <i>Relevant for team behaviours, how use when given no choice?</i> • <i>Always helpful to reflect on behavioural impact on others.</i> • <i>Maze useful to see different interpretations of instructions.</i> • <i>Reflective practice cycle – food for thought. Can assist in everyday workplace.</i> • <i>Metaphors help to reflect on behavioural outcomes.</i> • <i>Metaphors are a fun way of thinking about behaviour and how to adapt.</i> • <i>Maze is an interesting way to facilitate conversations and reflect on dynamics.</i> • <i>Greater understanding gained through today's [second] workshop has provided team with ability to valuably discuss techniques and their application. Can see value in future team interactions with discussing behaviour.</i> 					
Typical semi-supportive statements					
<ul style="list-style-type: none"> • <i>Glad team had opportunity to explore thinking together.</i> • <i>Maze discussion about behaviours and what we expect useful.</i> • <i>Conversations That Matter mind map format confusing and unhelpful, but content important and will assist important interactions.</i> • <i>Interesting discussion in seminar about engaging stakeholders.</i> • <i>Today, [second workshop] in a small group, we have been more reflective about the metaphor characters and how we relate to them</i> 					
Counter supportive statements					
<ul style="list-style-type: none"> • <i>Animal metaphor is helpful in context, but can be too simplistic.</i> • <i>Too simplistic to assume conscious behaviour choices – many don't have choice.</i> • <i>I do not believe that the metaphor techniques have impacted on the team interactions- most of us have not had time to familiarise ourselves with all the animals.</i> • <i>Staff members are constantly changing, so not a lot them had the benefit of the metaphor training.</i> 					
Analysis of reflections gathered (* see for full explanation of measures)					
#	Context	Planned Impromptu 0 Preplanned 1	Expectation Less 0 More 1	Experience Negative 0 Positive 1	Impact Unhelpful 0 Help me 0.5 Help others 1
1	Staff intimidation	0.1	0.8	0.5	0.5

* Each of the “measures” was taken from a semi-structured scale at the bottom of the reflection template and was self-tagged by the research subject at the time of writing the reflection (see completed templates in Appendix 4). The quantitative measure was recorded as an index of the scale (Zero on extreme left to 1.0 on extreme right) to the nearest 0.1.

Table 5.6 Validation of research question responses by Organisation B

(collated participant statements discussed in focus group to validate findings)

How is the stakeholder engagement process enhanced through the use of metaphor tools?
<ul style="list-style-type: none"> <i>You are able to understand your audience and how to approach them.</i> <i>Depersonalises the information. Common language stimulates discussion.</i> <i>Identification of behaviour/animal is easy. Ability to discuss and manage behaviour through animal characters and using cards.</i> <i>Increased understanding of likely responses to situations and impact of emotional states on people's perceptions.</i> <i>It may perhaps depersonalise the process. However, I prefer a more direct approach that honest feedback is given to me on a confidential basis.</i> <i>Once you become more familiar with the stakeholders, the metaphors may become more relevant in adapting and responding to them- metaphors may assist with ongoing stakeholder engagement.</i> <i>It is difficult to use the metaphors to reflect/prepare stakeholder assessment because often you have limited time/knowledge of the stakeholder and what animals they may be.</i> <i>Difficult to profile stakeholders as group can be made up of different individuals. – vast differences in our team behaviours.</i>
How can project team members influence outcomes more effectively by better targeting stakeholder behaviours?
<ul style="list-style-type: none"> <i>Sus out your stakeholder before, so you can think of what to say and how to better engage them.</i> <i>Use impact reflections PRIOR to approaching/dealing with stakeholders. Discuss internally as a group through constructive conversations.</i> <i>Better use of reflection and planning processes.</i> <i>Prior consideration of situations should lead to increased responses.</i> <i>Behaviour and emotional intelligence are key factors for effective outcomes with colleagues and stakeholders.</i> <i>Reflections prior to trying to engage stakeholders is a useful structure.</i> <i>If you are able to target stakeholder behaviours, you are better able to engage them in conversations, negotiate with them, relate to them and understand their needs and expectations and end up with outcomes that are mutually beneficial and satisfying.</i>
How does the team operate more effectively by using metaphor to help align roles or tasks to team members.
<ul style="list-style-type: none"> <i>Our team can operate more effectively by allocating tasks/projects to the team members who are better suited to the task. E.g. If project manager needs attention to detail then bee/owl required. If requires creativity and strategic thinking then apply eagles and whales.</i> <i>Non-judgmental technique leads to more open conversations.</i> <i>The use of common metaphors creates a common language and makes the conversations easier. Need to allow time and resources to become familiar with tools.</i> <i>Individualistically through understanding of own behaviour. Ability to influence</i>

<p><i>each other and stakeholders.</i></p> <ul style="list-style-type: none"> <i>• It may work well with respect to project work to align roles and or tasks but perhaps may not be as effective if team members are not willing to use the metaphors.</i> <i>• Metaphor can identify attributes of team members and how each contributes to skillsets E.G. Create or deliver the presentation.</i> <i>• Can't say- we have not had time to use them yet.</i>
<p>How has participating in this research made a difference for me?</p>
<ul style="list-style-type: none"> <i>• Will make me think more carefully in advance about what I want to achieve in dealings with others and the best way to approach that.</i> <i>• Made me realise that more effort required on my part to facilitate the team using these exercises. Practice will provide more familiarity.</i> <i>• I am very interested in learning more about behaviour as it is quite an integral part of communication.</i> <i>• Increased tools for analysing and managing behaviour, both myself and stakeholders etc.</i> <i>• It has made me more reflective on my work, my behaviours, my colleagues and my team dynamics. It has engaged more honest and fruitful conversations with each another.</i> <i>• It has not made much difference</i>
<p>Do you intend to continue to use the techniques? (any in particular and why?)</p>
<ul style="list-style-type: none"> <i>• Would like to if time allows.</i> <i>• Yes more reflection in advance about behaviours and interactions.</i> <i>• Yes, impact reflections for planning, especially in difficult conversations/situations.</i> <i>• Yes, behaviour analysis tools, reflection etc.</i> <i>• I need to familiarise myself with the characters. Once I have done this and confident with them, I believe they will be useful to me as I will be more confident and comfortable using them in the workplace.</i>
<p>How confident are you that continued use of these techniques will enhance your performance and improve project outcomes?</p>
<ul style="list-style-type: none"> <i>• I think they will be quite useful. Moderate level of confidence moderated by natural inclination towards caution.</i> <i>• Confident they will work as long as we maintain momentum.</i> <i>• Confident.</i> <i>• Confident, once I am more familiar.</i>
<p>Validated "researchers conclusions" for Organisation B</p>
<ul style="list-style-type: none"> <i>• The environment in Organisation B is such that there is little opportunity to adopt a creative method such as The Organizational Zoo metaphor based techniques.</i> <i>• There is little time to try anything other than get the basic job done or to perform reflection on actions taken.</i> <i>• The limited exposure to the metaphors (and time factors) limits the ability to use them in an effective way.</i> <i>• The environment is quite stressful, especially with the basic nature of the business being around addressing conflicts between stakeholders.</i> <i>• There are some of the team that believe the reflections and metaphor techniques have merit and could be applied to enhance the behavioural environment, but other who remain sceptical.</i>

An interesting observation about Organisation B is that they provided more individual (private via the feedback sheet) comments about the final focus group. There were clearly a number of comments that they were not prepared to make in a public forum. Some of these were contributed once they knew that the final exchange of views were complete. Therefore these comments could not be validated by the focus group, but were still provided in writing on the final feedback sheets. The researcher's opinion is that there was a sense of fear of being critical in the environment and this was highlighted in some of the comments that were discussed and validated in the focus group (such as the impact of who is in the room on the outcomes). The tone of these comments was largely negative about the organisation and aligned with the final independent interview documented several months later by the manager who has since left the organisation. These comments all came from participants who commented positively about the techniques in other parts of their feedback (traceable due to the "person number" recorded on all feedback forms).

Examples of such quotes are:

- *Doubted there was total honesty being displayed about team behaviours.*
- *Love to see outcomes if everyone was fully open.*
- *Would be different if the boss was there.*
- *Outcomes may be different if different people were in the room.*
- *No buy-in from the management team, therefore not an item for discussion.*
- *Environment was not conducive to using this tool. Team did not take enough time to understand. Senior (influential) member of my team dismissive of the technique/process.*

It is unfortunate, but understandable in such a negative culture, that these difficulties could not be openly discussed and explored. The challenge with such problems is that it is the act of not openly discussing the issues that enables them to continue (Amabile & Kramer 2011) and this contributes to a continuing negative spiral in employee engagement. This is an issue the researcher has also observed in their own work experiences on several occasions and one that should be corrected by performance management processes, but rarely is.

An independent final perspective for Organisation B

Seven months after the final intervention was completed a senior manager of the team was interviewed about the impact of the research interventions (refer 3.6.8). This manager had recently departed from the organisation as they had been deeply stressed about the behavioural environment. They described the environment as toxic and being controlled by a small number of players who were highly political and reluctant to enable changes to take hold in the environment. They believed that this had a lot to do with the ability to get the metaphor adopted into the environment and they believe that this was because it was seen as a risk to take control from those who were dominating. They stated that the dominant parties “played the game” during the research to appear they were engaged, but only ever intended to “pay lip service” to allowing the metaphor techniques to be applied in the norms of how the process was done. Supporting this argument, was the fact that the cultural change project on which the research was being conducted was never fully supported and eventually was not completed. Whilst it is not possible to create a direct cause and effect relationship between the non-adoption of the metaphor in this workplace and the culture, it was their opinion that this was a very significant factor in its demise. The opinion of the researcher is that a lack of leadership in this environment was to blame. The overall leader of the team displayed very little interest in the day to day activities of the team and actively pursued a very tactical operation. They were interested in responding quickly and politically rather than well and in a strategic and sustainable manner. As a comment that is difficult to provide evidence for (other than the researchers thirty years of experience in a range of workplaces and through anecdotal conversations with other experienced consultants), such a culture is not uncommon and usually had the outcomes generated in this environment. That is, highly tactical activities being poorly executed by unhappy people. It is unfortunate that such work environments are able to remain in place.

Researchers comments regarding findings from Organisation B

Overall, for Organisation B it is clear that several of the people in this environment found the metaphor methods intuitive and useful to understand behaviour.

Conversations led to highlighting some significant changes that needed to be made to enhance workplace performance, but these were never implemented, so it was not possible to assess if the metaphor could have an effect on performance outcomes.

The inherent negativity of this organisation can be clearly identified in the comments and were discussed in the previous section as well as in the independent interview. The researcher believes that this negativity had a dramatic impact on the team and could see from the body language in the interactions that several of the participants were heavily influencing the interaction of the group. The political overtones in the group clearly were an influencing factor in the lack of uptake of the methods, especially when the feedback was in the majority supportive of the techniques.

Key themes emerging from the data in Organisation B

Although there was a lot of positivity from many people in the organisation, the political influence of a minority greatly influenced the behaviours of others. This behavioural negativity limited what evidence could be gained to support the research, but clearly highlighted what the research was attempting to show. That is, the very significant impact behaviour has on project outcomes.

Researchers reflections on the learning from cycle one

Cycle one generated evidence to support the proposal that behaviour has a significant impact on project outcomes. Every participant interviewed as part of this research answered “yes” when asked if they believed behaviour had a significant impact on project outcomes including for the later cycles). However, only a small proportion of the participants could describe any targeted or formal activities to optimise the impacts of behaviour on their projects.

The differences in the behavioural environments of these two organisations are striking. Six out of seven project team members from organisation A were open to adapting behaviours to suit the project context and five of these were successful in achieving positive outcomes. The seventh member was reluctant to apply the method

at the time, but at a later stage was more open to the application of the methods (stimulated by a change in the organisation structure which made them feel less comfortable and thereby looking for an alternative way to deal with the new context). Only one of ten team members from organisation B were prepared to adopt the model and the project outcomes were not achieved, largely due to behavioural issues.

In organisation A, use of the reflective metaphor model provided insights which project members reported assisted the performance of their projects. Organisation B was characterised by aggressive and change resistant behaviours throughout the project, resulting in a failure of the project to progress. In this case the project team accepted the usefulness of the model but chose not to apply the principles in their workplace claiming time commitments did not allow them to add extra activities beyond the immediate tasks on their program. Their predetermined approach and ill-defined project outcomes conspired to reinforce the status quo of this organisation and prematurely kill off the project.

The interesting observation was that soon after the research was conducted in organisation A, there was a significant restructure and this resulted in a significant shift in the organisational culture (refer to example reflection in Appendix 4). Under the new leadership, there was a more control and command focus which led to an entire set of behaviours being displayed and many of the staff leaving, a symptom that was an outcome of the leadership behaviour in organisation B. It seems that the adage “we join organisations and leave managers/leaders” is a truism and this observation supports the link to how leaders behave and relate to others impacts how the team performs (Bierhoff & Müller 2005; Bourke & Barroon 2007; Bryde 2003; Cervone 2008; Jacques, Garger & Thomas 2008; Müller & Turner 2010; Slevin & Pinto 2004). Both these organisations displayed situations that show why the development of a positive behavioural environment is critical to performance improvement and what happens when it is not present. This is supported by a survey of certified project managers conducted by Schmit and Adams (2008) who reported that conflict between team members was the second highest impact on team motivation. Poor behaviours such as political influences, highly secretive and competitive interactions drive out the people who can improve the situation whilst retaining those who have a vested

interest in preventing change. It can be a real challenge to change behaviours when those who confirm they need to change are not allowed to do so or are not prepared to invest in what it takes to do so as was the case in Organisation B. Despite the majority of the people involved from both organisations providing positive feedback about the metaphor and the model, there was a very big difference in what they did with this new opportunity. As the senior team member indicated the participants were more interested in leveraging their political behaviours to maintain the *status quo* rather than challenge themselves to move into a more productive environment. This is consistent with the work Andersen, Dysvik & Vaagaasar (2009) highlighting how the culture of an organisation influences how projects are implemented.

5.3 Cycle 2: Organisation C

Members of the team from Organisation C were quite diverse in personality and from a wider range of levels in the organisation compared to the other three (from secretarial assistant through to senior management, whereas the other organisations were from more common middle management peer levels). They were quite open to the metaphor, but generally time poor. There was an overall enthusiasm to adopt the methods, largely because they had a specific need to generate some behavioural changes in a specific group and this was seen as a potential way to achieve that goal. There was certainly a genuine strong intent to apply the methods, and some did so quite effectively, but a restructure soon after the final intervention resulted in a significant loss of people from the organisation who had been involved in the research.

Tables 5.7, 5.8 and 5.9 collate the data from Organisation C. These tables represent a combination of *direct quotes for the participants* and researcher observations or collations of data using quantitative analysis. The data are discussed at the end of this section to highlight key themes and learning points from this specific organisation. The participant quotes in Table 5.8 have been collated, by the researcher into three categories to support easier understanding of the general “feel” of the comments across the participants from this organisation. This classification was validated by the

research participants in the focus group as the last activity in the research for this organisation.

Table 5.7 Validation of statements by Organisation C (in focus group)

Question to Organisation C	Summary of research participant answers (answers compiled from baseline assessment)
<p>Characterising your organisation.</p> <p>Summary of the organisation based on the collated feedback and observations by the researcher.</p> <p>Statement was discussed with research participants to validate it.</p>	<p>A commercial service provider, this organisation is usually under time pressure to respond to demanding clients. The pods group and related services teams collaborate effectively to get the work done, although the environment is often more tactical than strategic.</p> <p>The “pods teams” provide shared administrative services across three managers. Although this is a relatively new approach (compared to dedicated services for each manager) the administrative teams are developing good relationships. Often creative ways are tried on the fly in order to deliver what is required by the client, so the “rules” are not always followed (since delivery is valued more highly than rigid compliance to processes. This research was focused on supporting the pods group and related services to bed down the new relationships.</p> <p>The organisation is not especially change averse due to rapid growth through acquisition and assimilation. It fits the profile of a well-balanced Zoo much more than an imbalanced one. During the research a redundancy of a senior manager caused some stress and distraction for the teams in the study.</p>
<p>Do you believe the metaphor techniques impacted on your team interactions?</p>	<p>Yes 8/11 (see benefit statements in Table 5.8)</p> <p>Unsure 1/11</p> <ul style="list-style-type: none"> <i>Too early to tell, but ultimately will look at them in a different way & respond accordingly</i> <p>No negative responses, 2 did not answer the question</p>
<p>Did you apply any of the techniques in your work and if so, did it work well?</p>	<p>6/12 attempted to apply the techniques all six reported a positive outcome. A comment made by several other participants was they have not yet had the time to try the techniques, but have intent to do so.</p> <p>5 participants recorded a reflective impact form detailing benefits.</p>
<p>What impact did the research interventions have on your views on how projects should be approached?</p>	<ul style="list-style-type: none"> <i>I feel with the group I work with become hyenas in order to get the results we desire</i> <i>Shocking to see how we described ourselves, but realistic and now can attack it</i> <i>Should change the way we perform training and what topics we train.</i> <i>Accurate reflection on the organisation, maybe</i>

	<p><i>individual perspective, but started to change/improve approaches</i></p> <ul style="list-style-type: none"> • <i>Impetus to improve training and communication</i> • <i>Made me realise how important the “mix” is to achieve desired outcomes</i> • <i>I see the zoo very clearly in my working life- another perspective on how to interact</i> • <i>Make it clear how different people thought differently about the organisation and projects – made me reflect about the case</i> • <i>Enabled me to identify different behavioural patterns that existed</i> • <i>Completely agree with interventions as realised what other people thought may be true given their situation and behaviour</i> • <i>I see myself more clearly and my fit with the company</i> • <i>Clear that behavioural types are necessary for implementing projects</i> • <i>I now can manage tasks and projects by influencing people’s behaviours</i> • <i>Surprised by the lack of developmental projects and how other people view it</i>
Have your attitudes towards the use of metaphor techniques in project management changed? If so how?	<ul style="list-style-type: none"> • <i>I agree that metaphor is a simple yet effective way to read and interact with your surroundings, gives an understanding of how to handle our daily encounters</i> • <i>Practical information rather than theory/academic awareness</i> • <i>It is more important to know the other person and the result will be better</i> • <i>Now aware of techniques, stakeholder interactions easier</i> • <i>Prioritise issues from stakeholders perspectives</i> • <i>Understand myself better, know when to lead or be lead</i> • <i>Used to use metaphor passively, but now I understand it. I can actively employ it and monitor outcomes</i> • <i>Shows how different people perceive behaviour and also the similarities in the organisation</i> • <i>Yes, Organizational Zoo has given each behaviour a “face”</i> • <i>Gives an idea of what sort of character I want to be, given a different situation</i>
What are your reflections of the impact of the reflective practice, conversation, and metaphor model on your own thinking and behaviour?	<ul style="list-style-type: none"> • <i>Open discussion helps to understand different personalities in your team which helps to get better results</i> • <i>When people are engaged more ideas come out and can be taken and reflected on</i> • <i>Outstanding! Leads to more honest and open approach to people you interact with</i> • <i>Learn to take the good with the bad- listen to what</i>

	<p><i>people say and how they say it</i></p> <ul style="list-style-type: none"> • <i>Reflective practice gives the confidence and plan to approach a situation for the past or better equip us to tackle in future</i> • <i>Gave me a big picture of what, who, how and when and the behaviours displayed</i> • <i>I understand I can be more than one character given a situation and different characters in different situations</i> • <i>To be determined (too early)</i>
Which techniques did you use and comment on how effective they were?	<p>Conversations that Matter 4 participants</p> <p>Character cards 7 participants</p>

Table 5.8 Organisation C research participant statements on benefits of metaphor (discussed in focus group to validate findings)

Typical supportive statements					
<ul style="list-style-type: none"> • <i>We started seeing individuals as animals and now have an understanding of how to appropriately interact with them.</i> • <i>I believe it does help to understand the team</i> • <i>Very much so, helps access to team mates for specific jobs (eg eye for detail)</i> • <i>Leverage traits of your team mates to get the job done</i> • <i>I believe strongly after the workshop I can recognise behaviours and reciprocate using the metaphors</i> • <i>Metaphor techniques did impact the team interactions, each team member was more courteous in their behaviours towards each other</i> • <i>I believe because my team also understands the use of metaphors that we can understand others behaviour better and respond better.</i> • <i>It identifies the characters of individual so we know how to deal with the characters</i> 					
Typical semi-supportive statements					
<ul style="list-style-type: none"> • <i>Too early to tell</i> 					
Counter supportive statements					
<ul style="list-style-type: none"> • <i>No negative comments made</i> 					
Analysis of reflections gathered (* see for full explanation of measures)					
#	Context	Planned Impromptu 0 Preplanned 1	Expectation Less 0 More 1	Experience Negative 0 Positive 1	Impact Unhelpful 0 Help me 0.5 Help others 1
1	Unexpected redundancy	0	0.8	0.8	0.5
2	Calm under warning issue	0	1.0	0.7 Despite negativity	0.5
3	Mailout error	0	0.5	0.9	1.0

	correction				
4	Deciding to move on	0.5	0.7	0.8	0.5

* Each of the “measures” was taken from a semi-structured scale at the bottom of the reflection template and was self-tagged by the research subject at the time of writing the reflection (see completed templates in Appendix 4). The quantitative measure was recorded as an index of the scale (Zero on extreme left to 1.0 on extreme right) to the nearest 0.1.

Table 5.9 Validation of research question responses by Organisation C

(collated participant statements discussed in focus group to validate findings)

How is the stakeholder engagement process enhanced through the use of metaphor tools?
<ul style="list-style-type: none"> • <i>When we understand stakeholder behaviours and traits we can adapt to reap full benefits and success</i> • <i>Helped me to understand them much better</i> • <i>We deal with people who are different animals, so we have to adapt and change</i> • <i>Once assessed stakeholder, can adjust to their requirements</i> • <i>When difficult issues arise, metaphor can enable stakeholder to buy time and cool down issues to better deal with later</i> • <i>Helped to recognise how to approach a stakeholder with a particular behaviour resulting in a win-win outcome</i> • <i>Allows me to sit back and analyse different behaviours and the best way to interact with them</i>
How can project team members influence outcomes more effectively by better targeting stakeholder behaviours?
<ul style="list-style-type: none"> • <i>Understanding who I am and who they are and who I want to be in whichever situation</i> • <i>How we can collaborate and grow together to achieve desired results</i> • <i>Understanding what they need to hear and how to express this in the most effective manner.</i> • <i>Once we know what our stakeholder wants you will get a better outcome and discussion</i> • <i>Awareness of personalities- ensure cater for them</i> • <i>Could help project team members to target stakeholders and resolve issues quickly and effectively</i> • <i>By analysing the stakeholder behaviour and approaching them with the best suited behaviour</i> • <i>Using techniques to subdue or counteract negative behaviour will benefit team outcomes.</i>
How does the team operate more effectively by using metaphor to help align roles or tasks to team members.
<ul style="list-style-type: none"> • <i>We see who we work well with and understand why we find it difficult to interact/work with others</i> • <i>Useful technique to apply across the board to achieve better results as a whole rather than individual</i>

- *Different people are different animals, if we are dealing with a lion, then you can't be a lion and get best results.*
- *Identify the right person for the role (example used- eye for details)*
- *Put a team together that has diversity to complete whole job effectively*
- *Each person's behaviours has strengths & weaknesses – choose diversity in team to have more effective/better equipped team for better project outcomes*
- *Metaphor helps to recognise who could collaborate/work well together*
- *Assigning tasks that a certain behaviour will excel in will benefit the team*
- *Identify each character in team and share work according to characters*

How has participating in this research made a difference for me?

- *I now simply understand my behaviours and others*
- *It is not a massive theory with long winded psychological words*
- *Become aware of possibilities and missed opportunities – both in career and personal life.*
- *Made me understand the different animals we deal with and how to tackle them in a better way*
- *See my place in the zoo, how to move around safely, realise how the animals interact with each other*
- *Learnt more about my behaviour and others*
- *Better understanding about leadership issues*
- *More confidence in my learnings and behaviour*
- *To better understand behaviours*
- *Good to know team member behaviours can change- give me ideas on how to deal appropriately with them*

Do you intend to continue to use these techniques?

- *Yes. Hopefully enough staff will continue to implement the techniques ... to become more efficient and successful*
- *Like to understand & learn technique to ensure it becomes second nature*
- *Definitely will become advantage once part of the natural thought process and ultimately improve performance and project outcomes*
- *In customer service requires us to use these techniques in our day to day dealings*
- *Yes of course. I enjoy being an Owl and knowing I can be a lion/eagle when situation demands*
- *I am constantly amazed at the learning ability of new staff and what they bring to the company*
- *Yes definitely – more effective tackling of others behaviour and to achieve desired outcomes*
- *Yes, Conversations that Matter as they help to achieve good results*
- *Yes, better understanding of behaviour*

How do our behaviours benefit us and create limitations for us?

- *Behaviour is a significant limitation in the workplace and questioning to understand the behaviour of others helps to categorise them and deal with them*
- *Could change tactical behaviour, more time to review and think before action*
- *Understanding differences between assist and manager role in terms of behaviours and responsibility*
- *Friendly helpful behaviours help interactions, but can cause overloading, negative behaviours cause negative impacts*
- *Behaviours exhibited by me will be more influential on others- motivates and helps work as a team and in turn effective*

<ul style="list-style-type: none"> • <i>Our behaviour may bring out negative vibes when frustrated & demotivated- which does not allow me to perform at my best</i> • <i>Understand how I prioritise responsibilities and work too close to a deadline</i> • <i>I learn from mistakes by reviewing tasks and analysing processes and results</i>
In what ways can I develop better relationships given my behavioural preferences?
<ul style="list-style-type: none"> • <i>Understanding that people are not just one animal, but many.</i> • <i>Need to adapt my behaviours for different contexts in order to achieve more from others.</i> • <i>Learn to work the room/people and understand how to respond to the environment – not natural but could be learnt</i> • <i>Sit back and view behaviour impact on outcomes</i> • <i>Stay true to myself and always offering my opinion</i> • <i>Positive behaviours and mentoring ability have helped me in my career</i> • <i>Important to align my behaviours with the others involved to develop better relationships, but at the same time put forward opinion and explain how beneficial for us all.</i> • <i>Knowing my behavioural traits will allow me to work better with others. Knowing their traits enables better interactions.</i>
How confident are you that continued use of these techniques will enhance your performance and improve project outcomes?
<ul style="list-style-type: none"> • <i>Confident- so simple to understand and embrace</i> • <i>Reflected on a story of how engaging with the right behaviour enabled business owner and customer to find better business outcome.</i> • <i>The fire has been lit and burning strongly- these techniques excited me and I want to show them off</i> • <i>Pretty confident as projects are always mishandled and out of budget/overrun. Plan to use metaphor to choose teams for more effective project processes</i> • <i>It would really help and behavioural patterns would develop</i> • <i>It helps to anticipate behaviours and outcomes</i>
Validated “researchers conclusions” for Organisation C
<ul style="list-style-type: none"> • <i>Overall perception of the Zoo metaphor techniques in Organisation C is positive and highly likely that several people will continue to proactively use the techniques to enhance behavioural interactions.</i> • <i>Despite time pressures, participants can see the value of applying the techniques and investing the time to reflect on the outcomes (both in advance and after the event).</i> • <i>Having many people in the team familiar with the technique helps with the general use of the tools and create a common language between people using it.</i> • <i>The techniques are useful for diffusing issues with the clients/stakeholders.</i> • <i>There is a belief across the team that metaphor and reflection techniques enhance behavioural environment and project outcomes</i>

An independent final perspective for Organisation C

Four months after the final intervention was completed a senior manager of the team was interviewed about the impact of the research interventions (refer 3.6.8).

Researchers comments regarding findings from Organisation C

Overall, for Organisation C the metaphor methods were well received and applied for at least a period of time. Like Organisation A, a restructure immediately after the research was complete significantly reduced the number of people in the organisation that were involved in the research (only 7 of the 12 involved in the research remained in the organisation and some that remained went into different roles). This made it difficult to maintain the momentum of using the metaphors for team dialogue, but some informal practice remains which is helping those individuals and the metaphors are still being used in informal conversations.

Key themes emerging from the data in Organisation C

Organisation C demonstrated the very damaging impact of task focus over strategy, high staff turnover and ongoing restructures. Although there was significant enthusiasm amongst the research participants, very little longer term outcomes resulted from the interventions. The primary reason for this was people did not feel they had the time to “play”.

5.4 Cycle 3: Organisation D

There were many more research participants (twenty-two) from Organisation D than the other organisations providing a much richer environment for conversation and idea sharing. The participants were generally quite open to the research and willing participants. The majority of the group were supportive of the metaphor techniques, although there was one participant who was a consistent sceptic and remained so throughout the research. That said, this participant (clearly identifiable through the way they constantly challenged the ideas in the open dialogues) participated in a professional and dignified manner. Their raising of alternative perspectives added to the richness of the dialogue as they stimulated an alternative perspective that provided

a greater diversity to the conversations and triggered deeper and richer exchanges of ideas and concepts.

Tables 5.10 and 5.11 collate the data from Organisation D. These tables represent a combination of *direct quotes for the participants* and researcher observations or collations of data using quantitative analysis. The data are discussed at the end of this section to highlight key themes and learning points from this specific organisation. The participant quotes in these tables have been collated, by the researcher into three categories to support easier understanding of the general “feel” of the comments across the participants from this organisation. This classification was validated by the research participants in the focus group as the last activity in the research for this organisation. The format and content of these tables is slightly different from the other organisations as the interventions needed to be adjusted to cater for the larger numbers and also to account for some learning points from data collection experiences in the two earlier action research cycles. However, in essence, the approach and type of data is very similar, the key differences being greater richness and volume.

Table 5.10 Validation of statements by Organisation D (in focus group)

Question to Organisation D	Summary of research participant answers (answers compiled from baseline assessment)
<p>Characterising your organisation.</p> <p>Summary of the organisation based on the collated feedback and observations by the researcher.</p> <p>Statement was discussed with research participants to validate it.</p>	<p>A professional service and advice provider to state government in the fields of media services and marketing, this organisation has a positive attitude to responding to requirements in an environment than can change dramatically depending on what other government priorities arise.</p> <p>They have a significant and visible impact on the general public through direct and indirect services being communicated widely into the community. Many of the new services provided to internal and external stakeholders are managed through projects. The immediate team seem quite comfortable with each other and are generally aware of diversity in behaviour and communications styles.</p> <p>This group is part of a wider services group who interact widely across government activities. They</p>

	are a balanced Zoo much in the main and clearly have a good team spirit with strong elements and Bee and Eagle, but do not have much aggression or political strengths which may inhibit some of their tougher initiatives.
How do our behaviours benefit us and create limitations for us, as a group? Did the metaphor characters assist this understanding? If so, how?	
<ul style="list-style-type: none"> • 15/22 stated the metaphors were helpful to assess behaviour and most provided an example to highlight how this worked for them • 7/22 were neutral about the usefulness of the metaphor, 2 saying they don't yet know enough about them and one saying they did not help them to understand. I stated that the tool was not that different to other classification tools. • General agreement across the group there was a reasonable level of awareness of the impact of behaviour on team outcomes • General theme that the team has a balanced behavioural profile, although some recognition that there is a low level of aggression (and some disagreement as to whether this is an issue or not). 	
Can the metaphor characters assist me to develop better relationships given my behavioural preferences? If so, how might I do that?	
<p>Supportive comments: (14/22)</p> <ul style="list-style-type: none"> • Help define a common approach • Yes (2 people with no elaboration or examples) • Gives really good description of who you are dealing with & how to play to your strengths • Best illustration is use cards to think about own behaviour when dealing with stakeholders • Useful tool to help reflect on behaviour & guide thinking on approach with stakeholders • One way to provide insights on how to interact • Understand stakeholders characteristics may determine best approach • If used within a reflective cycle, could be useful for planning how to influence others • Chunks down each person/groups behaviours and identifies key aspects • Figure out what animal the stakeholder is, so figure out which I need to be to interact well • Can help define an approach to working with stakeholders • Helpful to define your audience & moderate behaviour to achieve your goal • Yes, it enables you to manipulate the situation <p>Semi-supportive or neutral comments: (6/22)</p> <ul style="list-style-type: none"> • It can be difficult to accurately read stakeholders, especially if unpredictable • Think it will be quite helpful, but requires mindfulness ongoing • Potentially, work well in planning ahead for difficult situations. Wonder if can work in midst • I think it has potential to do that. It will be a good planning tool. • I think a lot of ideas with many metaphors means grappling with many characteristics • Maybe process of analysing a stakeholder's behaviour when being difficult may be useful 	

- *Beginning to see it could help, not sure I can use a behaviour that is not my natural way*

Typical counter comments: (2/22)

- *In small groups the metaphor changes with situations, larger groups too variable*
- *It does not provide a key to how to use one character to balance/work off another*
- *I have not seen evidence of this, although I did not attend first session*

Do you believe that the model combining reflective practice, conversation, and metaphor will be useful for your own thinking and behaviour?

Supportive comments: (11/22)

- *I think we automatically/instinctively do this. You assess the nature of the beast and approach best way possible depending on the traits of the person involved*
- *Yes, particularly the reflective part and using this at start. Gives chance to plan first*
- *Yes, this is an area where I want to improve my performance*
- *Yes it helps when working with a variety of stakeholders and groups*
- *Yes, particularly pursuing the benefits of an adaptive approach to different situations*
- *Yes, but needs to be integrated into a team approach on a regular basis*
- *Any time you reflect on behaviour helps. I believe the metaphor will be more effective at team level than individual level.*
- *Yes (no extension/examples provided)*
- *Sometimes difficult when working alone, but the model does reference the need for planned (pre and post) analysis of behaviour as spontaneity can often be an issue*

Semi-supportive or neutral comments: (10/22)

- *I feel the model works for me up to the metaphor, but the metaphor itself not so*
- *Some of it yes*
- *Probably help more in the short term, but smaller effect as time passes*
- *Possibly, only if I embrace it and practice it regularly*
- *In some ways, reflection and conversation are obviously very helpful*
- *Yes, I think so (another 'It probably will be')*
- *It will be useful if I remember to utilise this knowledge*
- *Perhaps, I need to test it on real live situations as directed*
- *Maybe- can't say until used in practice. Query whether can change characteristics*
- *Theoretically useful but needs to test refine/adapt to suit personal style*
- *Not sure, time will tell*

Counter comments: (1/22)

- *Not really. Each situation is different and requires several attitude adjustments depending on meeting*

Comment on any of the techniques used in this research that made an impression on you and which you may use in future.

Technique	Positive	Neutral	Negative
Conversations that Matter	1	3	1
Zoo Metaphor planning	10	4	

Stakeholder assessment	14	3			
Character cards	14	1	1		
Invisible Maze	9	1			
How confident are you that continued use of these techniques will enhance your performance and improve project outcomes?					
Will use (10/20) 2 did not answer question					
<ul style="list-style-type: none"><i>Very much so. Confident will enhance, trick is to apply. Like to keep our work interesting. Intuitively understand and open to trying. Depends on the makeup of the stakeholders. Part of planning and evaluation of group. Potential to enhance team outcomes. Need to plan first and reflect after to get full effect. Always find such tools useful. Will help my development- but need to persist.</i>					
May use (5/20)					
<ul style="list-style-type: none"><i>Perhaps as a team exercise, not me individually. Key is to find time ahead of interactions. See how it works in practice. Whole team needs to know the characters. All need to participate.</i>					
Not confident I will use (5/20)					
<ul style="list-style-type: none"><i>Not very/not so confident. 26 is a lot to remember. Not confident at this stage.</i>					
Analysis of reflections gathered (* see for full explanation of measures)					
#	Context	Planned Impromptu 0 Preplanned 1	Expectation Less 0 More 1	Experience Negative 0 Positive 1	Impact Unhelpful 0 Help me 0.5 Help others 1
1	Manager approval	0.6	0.9	0.8	0.7
2	Appoint service provider	1.0	0.5	1.0	1.0
3	Engage new director	1.0	1.0	1.0	0.5
4	Regular manager meetings	1.0	0.7	0.7	0.5
5	Testing cases	1.0	0.5	1.0	1.0
6	Project delivery	0.5	0.5	1.0	0.6
7	Social media launch	0.5	0.9	0.9	0.7
8	Influence outcome senior mg'ment	1.0	0.5	1.0	1.0

* Each of the “measures” was taken from a semi-structured scale at the bottom of the reflection template and was self-tagged by the research subject at the time of writing the reflection (see completed templates in Appendix 4). The quantitative measure was recorded as an index of the scale (Zero on extreme left to 1.0 on extreme right) to the nearest 0.1.

Table 5.11 Validation of research question responses by Organisation D

(collated participant statements discussed in focus group to validate findings)

How is the stakeholder engagement process enhanced through the use of metaphor tools?
<p>Supportive comments: (18/22)</p> <ul style="list-style-type: none"> • <i>It lets you talk abstractly to take edges out of conversation</i> • <i>Engages another part of the brain, a different way of looking at a problem</i> • <i>I can picture people as certain animals and how I should deal with them</i> • <i>Helps understand their behaviour and identify the traits you need to adopt to engage</i> • <i>Through a conscious process of analysis, problematic relationship could be improved</i> • <i>In theory, greater influence is achieved as behaviour meets the situation/personalities</i> • <i>Planning (2 Helpful in planning the way we deal with traditionally challenging stakeholders)</i> • <i>Need to understand your audience to target your collateral and message with them</i> • <i>Working with stakeholders and understanding what they will respond to</i> • <i>Helps determine the characteristics of stakeholders & anticipate reactions and approach</i> • <i>For what can be a controversial topic, metaphor adds humour and plays down seriousness of the task, especially for people who take things personally allows you to clearly identify key characteristics</i> • <i>Gives planning time and space & the chance to quickly discuss with a partner</i> • <i>Planning interactions and considering options for success influence different stakeholders</i> • <i>Helps define approach and how to communicate to variety of stakeholders</i> • <i>Enables me to segment the stakeholders and alter approach</i> • <i>Strategic, step back and honest look at behaviour. Wise and respectful</i> • <i>Intuitive, positive and easy to understand. Metaphor tool helps “unpack” stakeholder engagement</i> • <i>Metaphor can provide a new perspective on how to manage yourself when dealing with stakeholders</i> <p>Semi-supportive or neutral comments: (3/22)</p> <ul style="list-style-type: none"> • <i>Enhanced? Probably more reinforced... Useful for reminding you to think about stakeholder attitudes/position before a meeting</i> • <i>Too early to tell, not trained enough yet to apply the tool in real situations</i> • <i>Unsure how it will work in practice</i> <p>Counter comments: (1/22)</p> <ul style="list-style-type: none"> • <i>No. I appreciate the effectiveness of the metaphor system, but yet to discover how it helps develop relationships</i>
How can project team members influence outcomes more effectively by better targeting stakeholder behaviours?

Supportive comments: (20/20) (no semi-supportive or negative comments)

- *They can target the stakeholder behaviour to figure out what makes them tick & communicate to get the desired result*
- *Improved communication, modified behaviour*
- *By taking time to understand the behaviours & respond for best outcome*
- *By considering which animals is best to employ in challenging situations & transfer to actions*
- *Project teams to look at the personalities within a team and how adaptable people are and what situations they can be applied to*
- *Identifying advocates among stakeholders and what behaviour will engage them*
- *Recognising their own strengths and using proactively to achieve desired outcomes*
- *Identify strengths and weaknesses and how to exploit them*
- *Working together and using the right mix and animals to engage stakeholders*
- *Understanding stakeholder characteristics and appealing to these to influence outcomes*
- *Planning*

How does the team operate more effectively by using metaphor to help align roles or tasks to team member?

Supportive comments: (15/21)

- *Shorthand to describe stakeholders, makes conversations more fun*
- *Working together is never easy, another tool is always welcome*
- *Plan the outcome and plan the steps to achieve it*
- *Work within the strengths and then use them to greater effectiveness*
- *Metaphor can help as one type of analysis to promote understanding*
- *Planning*
- *Understanding that a team is made up of different individuals is essential to cohesion*
- *Ensuring a common approach and thinking*
- *More collaborative and knowledgeable approach*
- *Using character cards to perform stakeholder assessment*
- *Get together to agree a plan of attack*
- *Helps align behaviour and style to appropriate situations*
- *Discussion around how different members of the team perceive the behaviours*
- *Metaphor helps team members to know their actions and path forward more clearly*
- *Bring different skills and experiences to the project. Improved communications*

Semi-supportive or neutral comments: (5/21)

- *Not sure about this as team roles are often automatic and not considered – possibly a declaration of metaphor by team members may start a useful at start of work*
- *TBC- haven't tried in a work setting yet*
- *We did "Fish" metaphor and was "full on" at beginning, but dropped off later*
- *Depends if you want to focus on strengths or give people opportunity to try something different*
- *Not sure yet, does give a common language and ideas about things*
- *Not sure*

Counter comments (1/21)

- *Not sure if this is effective. Applying metaphor to people may result in people feeling limited and not challenged with the opportunity to try new behaviours and learn new skills*

Validated “researchers conclusions” for Organisation D

- Overall perception of the Zoo metaphor techniques in Organisation D is positive and approximately half of the participants intend to use techniques to enhance behavioural interactions.
- A majority of participants can see the value of applying the techniques and investing the time to reflect on the outcomes (both in advance and after the event), although a couple of people do not agree or see potential negative connotations.
- Having many people in the team familiar with the technique will help with its application and increase likelihood of continued use.
- It creates a common language between people which helps make it easier to use/engage others with it.
- The techniques are useful for planning and diffusing challenges with the stakeholders.
- There is a belief across a significant proportion of the team that metaphor and reflection techniques can enhance behavioural environment and project outcomes.

An independent final perspective for Organisation D

Two months after the final intervention was completed a manager from a team that works quite closely with those involved in the research was interviewed about the impact of the research interventions (refer 3.6.8). The time between intervention and final interview was short because this organisation was done so late in the PhD program (because of research organisation delays in the earlier organisations and longer analysis and reflection between the organisations than originally expected). The interviewed manager was quite an interested observer of the research and what it was able to do for the research team, to the point that they decided to include the metaphor methods in a cultural change program being run in another part of the business. The manager was supportive of the metaphor based techniques and wanted them included in their planned cultural development and leadership development programs. This work continues beyond the research and is outside the scope and timeframes of the PhD.

Researchers comments regarding findings from Organisation D

Overall, for Organisation D the metaphor methods were used quite extensively and continue to be used to generate positive impacts. The facts that, (a) there was a larger group involved in the research and (b) that all the participants remained in the organisation, provide the ongoing support and momentum for the metaphor to be supported ongoing. This organisation has generated examples of positive use of the metaphors and several have reported positive benefits from its use. This final organisation did not have a specific project in which to demonstrate performance enhancement in, but there is some indication that benefits will start to emerge once they have the time to embed in the longer term programs they have planned.

Key themes emerging from the data in Organisation D

Organisation D shows what can happen when you get critical mass of professional staff, who engage in their roles and collectively have a diversity of styles. Actively engaging this group in Conversations that Matter was not difficult, because of their constructive behaviour and willingness to learn something new in order to enact positive change. This group provided a strong body of evidence to support all of the research objectives and questions. Politically and socially, they were the opposite of Organisation B and as a result ended up with positive value from their engagement (as opposed to no value for disengagement).

Organisation D added much-needed weight to the data for this research in several ways. Firstly it involved more than double the number of people involved in any of the other organisations. This provided a greater diversity of views and consequently much richer conversations. As a result deeper reflections were evident and more engagement of the participants as they bounced ideas off each other.

Although the order of the organisations was not planned, it turned out to be fortunate that they happened in the order they did:

Organisation A gave great confidence that there was something worth pursuing, but did not generate sufficient volume of data to create a strong body of evidence. The

restructure greatly influenced the mindset of the people involved and terminated the projects which all but prevented further progress. Within a short space of time there were only two of the participants left in the organisation and the organisation was not in the mood for new as yet untested creative techniques in the projects.

Organisation B showed just how bad a culture can be and if it had been the first organisation involved, the research may never have proceeded further. However, as it occurred after Organisation A there was a degree of confidence and resilience in the researcher and this assisted the pursuit of this organisation despite the clear behavioural difficulties. However, it was worth persisting with from the perspective that it was behaviour that was interfering with the adoption of a new technique that could correct the poor behaviour (chicken and egg scenario?). As it turned out, the staunch negativity in the environment prevented further development or application of the metaphor in that organisation, but that in itself was an interesting finding.

Organisation C therefore arrived at a time that the research was in the balance. It looked promising and small amounts of data from the earlier two organisations highlighted aspects that were supportive of the research objectives, but insufficient to claim they had been achieved. The early engagement at Organisation C went very well with good participation and interactions. Conversations in the interventions were reflective and open, making them ideal for the experimentation with the metaphor techniques. The feedback was a useful addition to the body of evidence from the earlier two and the level of intent seemed high for the ongoing use of the metaphor methods in the organisation. Early reflections returned useful outcomes and participants remained engaged. Then disaster struck again- another restructure! Half of the people involved in the research were lost from the organisation, the manager of the team involved changed and several people changed roles within the organisation. Although some individuals continue to use the techniques, there is insufficient momentum for the metaphor to build a significant following to reach a foundation capability. Under these circumstances, especially in a highly tactical and reactionary business, it is unlikely to become embedded practice across the organisation.

Organisation D therefore became the ultimate test. It needed to be an organisation with sufficient people to form a robust foundation and to be stable enough to ensure that those involved in the research had time to practice their new techniques with others that were also familiar with them. The fact that this organisation adopted the techniques for an ongoing leadership and cultural development program demonstrated that they are confident in the technique, but more importantly it also provides that ongoing exposure required to settle new techniques into common practice, or habits of the organisation. The fact that there were significant numbers of people who were positively influenced by the techniques has ensured that techniques are now making a difference for this organisation.

5.5 Independent practitioner feedback and reflections

The eight independent practitioners provided feedback for the research in two ways. Firstly, they each directly answered the research questions in a survey (as each of the participants in the organisations did). Secondly, they recorded reflections in an impact reflections diary, again in the same manner as other participants did. Once this information was collated, they were brought together in November 2011 to discuss the research findings and reflect on their own experiences in comparison to those of other research participants. Whilst not a validation as such, since they were not able to accurately critique the experiences of other practitioners and they had not actually observed in action, the exercise was useful to highlight the degree of commonality of experiences and consistency of outcomes.

Bringing together the independent practitioners to share their stories of how they applied the metaphor techniques was a confidence-building exercise. It was useful to listen to a group of people who voluntarily adopted the techniques because they believe the metaphor will help them in their professional activities (largely consulting, either as internal advisors or as external experts). Their involvement in the research was through self-selection. Practitioners known to be using the techniques and others were invited to share their experiences through an open communication on several on-line facilitator networks and through social media.

Table 5.12 provides a summary of the practitioner impact reflections, and examples of the completed reflections are provided in Appendix 4. A composite summary of the feedback to the research questions is listed in Table 5.13 along with a word cloud analysis to highlight the common themes across the answers for all practitioners for each individual question.

Table 5.12 Individual practitioner Impact Reflection Diaries

(Submitted via email on standardised form, refer Appendix 4 for full reflections)

#	Context	Planned* Impromptu 0 Preplanned 1	Expectation Less 0 More 1	Experience Negative 0 Positive 1	Impact Unhelpful 0 Help me 0.5 Help others 1
1	Student group	0.6	0.7	0.8	0.7
2	Team influence	0.3	0.8	0.8	0.7
3	Difficult employee	0.4	0.6	0.7	0.7
4	University tutorial	1.0	0.5	0.8	0.8
5	Values review	0.7	0.8	0.8	0.7
6	Group conflict	0.6	0.7	0.8	0.9
7	Technical meeting	1.0	1.0	1.0	0.5
8	Engage client	0.2	0.7	0.9	0.9

* Each of the “measures” was taken from a semi-structured scale at the bottom of the reflection template and was self-tagged by the research subject at the time of writing the reflection (see completed templates in Appendix 4). The quantitative measure was recorded as an index of the scale (Zero on extreme left to 1.0 on extreme right) to the nearest 0.1.

It is important to note that all these reflections recorded in the dairies were in the range of “useful to me” to “useful to others”. That is, there was none recorded in the not useful range. To some degree this is to be expected, as naturally people are reluctant to share what they consider personal failures and also there is a tendency to consider that the positive stories may be more supportive of the research. Although this supports the effectiveness of the research by showing that the reflective dairies are useful to record and enable the practitioner to reflections on what happened, there is a real danger of not reflecting on “negative” situations. Reflecting on things that did not go according to plan is a positive way to learn and build from these experiences. A good example of this is the reflection from Organisation B (Example 8 in Appendix 4) that shows how a positive learning can be extracted from a negative situation and how the metaphor stakeholder analysis can be used to reduce the impact of negative interactions. Whilst the situation was negative, the use of the metaphor was a positive way to approach this situation. A similar situation is reported in Example 7 (Appendix A) where the technique was applied to plan for what was expected to be a difficult meeting. The metaphor assisted the practitioner to better prepare for the expected argument.

Table 5.12 shows all practitioners reported the process of doing the reflections and recording them in a diary to be highly positive. This highlights the benefits of taking the time to record an event and thinking back on the exercise and what can be learnt from it. Unfortunately, in a “modern, busy world”, too often people just move on to the next experience, thereby missing much of the learning value from both positive and negative situations. The practice of “sweeping mistakes under the carpet” is common practice and this leads to the same mistakes being made again. Discussing mistakes is receiving more attention in the literature recently (Chua & Lam 2005; Edmondson 2011; Müller & Turner 2010; Zolli & Healy 2011), which can only be a good thing. Like the metaphor, a reflection about an event enables it to be managed as an “object” (separated for the people involved) and therefore discussed in a depoliticised manner. When this is done with a genuine intent to learn rather than blame, significant learning can happen as is done in effective Lessons Learnt or After Action Reviews. However, in highly political environments (such as occurred in Organisation B), it is very difficult to get people to trust that the defined process will

be followed. So some employees are reluctant to engage in the process in a committed and productive manner, and as a result the potential knowledge and capability gains are lost.

Committing a reflection to writing assists the quality of sense-making and the development of self-understanding and leads to better professional development. In the same way, sharing this reflection with others in small groups increases the richness of the understanding and provides other perspectives that the original person may not have considered. In this research, it was clear that the quality of the learning was greater in Organisation D than the others due to extent they shared their discussions and ideas with the others in the research. The fact that there were some open dissenters who continued to engage in the discussions, enabled a wider diversity of concepts and challenges into the conversations and this engaged the whole group into the conversations and led to richer insights.

(Collated statements submitted via email survey and validated in a focus group)

[illegible]

What is new for me, is I can share this people-centric approach with others in a very short space of time. I can sit down with a new colleague, in a new job, with a new company and propose we focus more of our effort building the right relationship than we do gathering business requirements. Animal metaphor is the story I can tell them over a coffee, a way to engage them with an alternative and practical approach to gathering business requirements, and one that they can apply immediately.

From the exposure I've had to the metaphor tools my confidence has grown and I'm able to better engage with my internal stakeholders. By using the cards before and after meetings and in conjunction with the online profiling tool I'm finding that I can communicate my thoughts and influence stakeholders better. In the next month I'll be transiting into a new role and this role will see me interacting more with my organisation's external suppliers. One of the key challenges I'm going to face is influencing these suppliers, something of which is really out of my comfort zone. Over the next few weeks I'm really going to get a lot out of the tools. I can see myself bringing out a few more of the animals.

When you are dealing with clients you have to engage them quickly in an activity that does not take a lot of learning to understand. The metaphors are an intuitive way to get them interacting with each other quickly.

By providing a non-threatening tool for aiding conversations; the metaphor can be used to take the political heat out of debates and differences of opinion.

The metaphor carries with it deeper meaning that leverages what we already know (instead of needing to learn a whole new vocabulary). This framework highlights not just the behaviours of the individual, but makes it easy to understand the relationships between the different behaviours, making it easier to understand relationships between stakeholders.

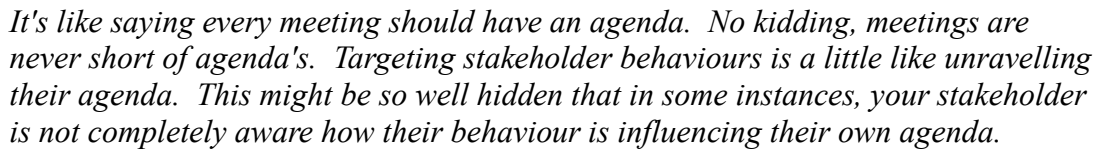
I think the first part in the engagement process could be enhanced is the CONCEPT. All the abstract concepts or ideas could be understood through metaphor tools. The tools could support stakeholders to have 'IMAGE' in their heads, so that they could better understand, whatever the real engagement process is, people at least get two ways to think: their own way and the metaphor way.

Since stakeholders could understand better, they are more likely to engage in any activity or project. Or in another way, since they could understand better, they then are able to be engaged

For example, in one of the project I was involved with, we used a diagram to describe the process. The project was about to build an online reverse auction portal. My team was in charge of designing and setting the business requirements. We started the project with one director while another director was overseas. Hence, we decided to draw a 'picture' to show our steps, so that when the other director came back, he would be able to know what we have done and where we were at. We chose different shape and colour to describe the events difficulties and time elasticity's. Since it was very descriptive and easy to follow, in the middle of the project, when the other director came back, he could follow us quickly and provided more relevant advices and requirements.

The metaphor provides a common language that we can all "speak". It was useful to reflect on how to deal with difficult stakeholders and interesting clients. I found it useful to challenge my perspective of the stakeholder in a private conversation with a close colleague. Sharing views and listening to trusted peer's view helped me to get a better understanding and see things I had not observed before. These help in being able to influence the stakeholder.

Research question 2: How can project team members influence outcomes more effectively by better targeting stakeholder behaviours?



I currently have a minor but important role in a major project that is happening within the company. In the past I've been more of "I'll keep my mouth shut and go with the flow" type of person during projects. Now that I've had exposure to the metaphor tools I've started profiling my fellow project members and working out what animal I need to be when interacting with them. In the last week I've been able to score a few quick wins for myself and for the project.

By better matching preferred behaviour profiles of team members with stakeholders. If everyone invested a little time to become more familiar with the characters, they can discuss them more effectively. This includes finding positive application of behaviours that many people would normally deem to be negative. For example aggression is usually thought of as bad, but there are times that this is required to get the job done. Same with politics.

In a project, all the people involved are the 'STAKEHOLDERS': project team members, project sponsors, project managers...etc.

Of course, the project team members could manage their outcomes better if they are able to target their own behaviours, and if they could understand the project manager's behaviour, they could then better understand the goal, the benchmark, the requirements, etc. and hence have a better project outcome.

And in my opinion, all the attitudes are beneath the behaviours. By better targeting the stakeholder behaviours, it's easier to understand people's attitudes and willingness.

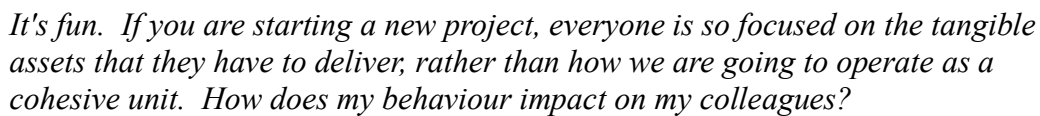
For the same project, since we set the rules of the colours and shapes, in our project team, everyone was keen to avoid to be 'black or green', we knew how our behaviours would be shown to others, hence we could at least try to avoid to behave inadequately.

And also, because we set the rules at the very first place, our project manager could take control of our team and the team member could easily follow the manager's direction. Plus, when we gathered the requirements from the project sponsor, which was the director, we could slightly feel what type of person was from his judgements and advices in our 'rules'. Hence, we could easily change the style of the portal wireframe, for example the next time we saw him. It was actually a good experience.

The metaphor can be used with stakeholders so they can see how the team behaviour is aligned with getting the best results. To an outside stakeholder, they do not necessarily understand why the team are doing what they do, so discussing the metaphor profile of the team helps them to either agree with the approach or challenge it using the metaphor language.

In the beginning I was not so good at reading the stakeholders, mainly because I was not so familiar with them. However, over time (and a few errors in my early assessments) I found I was becoming more effective in predicting their behaviours and was able to plan how I should interact with them better. I believe that this reflection over time was able to help me build stronger relationships and led to being able to influence them more.

Research question 3: How does the team operate more effectively by using metaphor to help align roles or tasks to team member.



Reflecting on my past role of Team Leader my team were scattered all over the place. I had Ants doing the work of Bees and vice versa and I was charging in like a Lion and putting the team offside. During all this there was one particular team member who wasn't performing well and was continually trying to undermine my authority and every time I tried to address these behaviours with her I was getting nowhere and realised then that I was the one who needed to change. With help from a fellow practitioner, the cards and the online profiling tool I was able to work out where I was going wrong with trying to manage this particular individual and the team. This person showed dominate Bee and Feline traits and through the use of these tools I was able to give her the leadership responsibilities and the "look at me" praise she desired by making her accountable for Continuous Improvement within the team and giving her tasks where the Bee would flourish. Taking the time out to really focus on these metaphor tools really turned things around for me, not only did I earn the trust of the team I also had management sit up and notice.

By matching team roles and tasks with the preferred behaviour profiles of individual team members.

The metaphor is just a trigger- a means to an end. It is not the metaphor itself that creates the value- it is the creative way it allows people to interact with each other about the roles required. It removes the politics and depersonalises the conversation so that people do not feel threatened and can discuss strengths and weaknesses constructively.

I think this is similar to the stakeholder engagement, it provides another way for people to think, help people to understand concept better by providing 'IMAGE'. Since people could have a better understanding of the roles and tasks, it is easier to them to operate, by this way, it is saving more time and resources.

In that project, my team was first separate people into colours before we actually met the project sponsors. We tried to judge ourselves by human nature, like who was more like a leader, would be red, who would be more sensitive and careful would be yellow, and etc. and then when we got the project requirements, we tried to set the tasks into colours again, and then matched the individuals into specific tasks. We also have different shapes to set the difficulties of the tasks so that we could make team work by choosing the right people. We borrowed this idea from the '6 thinking hats'. And it worked quite well, our project sponsors were both happy to that idea and they also found that was handier to figure out people and events.

Roles are important, especially in small projects where tasks need to be done well and often only as once off activities. There is little room for error. In this situation the team need to understand and trust each other to work interdependently. The metaphor helps this process by ensuring they are all on the same wavelength through regular conversations about the behaviours and relationships, but within the team and with external stakeholders.

I found the metaphor characters useful to assist an organisation realign people to new roles after a restructure. We facilitated conversations about the behaviours required to achieve the new directions and how this was different to how we were in the past. People could more easily understand the behavioural changes as they could visualise it literally by putting "the cards on the table" for each of the roles. These conversations helped the team settle more quickly and align better the new culture we were attempting to create.

The value of practitioner statements is that they are more familiar with the techniques and how to apply them in different situations. This addresses some of the criticisms from the research participants from the four organisations around the time invested to become familiar enough with all characters to be able to use them effectively. As with any new technique or ability, there is a learning curve which a practitioner must experience their way through in order to generate sufficient expertise and confidence to be effective. There is a significant difference between being involved as a participant in an intuitive exercise using the metaphor and being the creator and facilitator of an exercise to lead others through to generate outcomes. This was a

significant learning for the researcher. Just because the metaphor is easy to engage other in, does not mean that it can be learnt quickly at the facilitator level. Most of the practitioners all have significant management experience and have been exposed to a range of leadership development and management training techniques. As a result they are able to adopt and adapt the techniques more quickly and successfully than less experienced personnel, such as many of the research participants. However, in doing so they also get more value from the interactions as well. In some ways it is like comparing the work quality of an apprentice to that of a master. The learning for the researcher from this is to focus on a few people to develop to a superior level of knowledge and capability in an organisation and then leverage their superior capabilities to facilitate the change internally over a longer period of time. This approach is bound to be more effective if these methods are to become widely adopted. A similar approach is taken by other creative methods through accreditation of practitioners with demonstrated capabilities such as is done by the de Bono Institute and a range of professional bodies including the Project Management Institute.

5.6 Wider reflection on metaphor synergies and influences

Chapter Two provides a detailed understanding of why metaphor is a creative mechanism for the exploration of unfamiliar concepts and to support sense-making. It helps observers align their thoughts by comparing them to familiar ideas. There is evidence of how metaphor achieves this in this research, as well as through other literature (Gannon 2001; Lakoff & Johnson 1980; Morgan 2006), including some support for this to occur in project specific environments (Winter & Szczepanek 2009). However, there is also evidence that synergies can be achieved through the combination of tools that stimulates cross fertilisation of ideas, not just to understand, but to move the participants into as yet unexplored territories.

Etzold and Buswick (2008, p. 279) stated, *“One way of broadening the way one thinks about strategy is to bridge the gap between business and other disciplines. Ideas from the world outside business can be made useful for the strategist via metaphorical associations. In today’s ever faster changing global environment, business leaders should use insights from every field that is at hand – whether they*

derive from business or from history, philosophy, anthropology, dance, or any other academic field. Stimuli that are external to business can replenish “strategy” with the richness, freedom, and creativity it needs, so that managers can perceive trends the competition does not see.”

There is support in the literature to highlight behaviour has an impact on project outcomes (Cervone 2008; Jacques, Garger & Thomas 2008). Although this seems intuitive to people experienced in project management (perhaps management generally), there is little evidence in the academic literature to explain how this can be managed. Behaviour is a double edged sword in that “positive behaviours” such as openness, collaboration, trusting and caring can enhance the performance of a team and “negative behaviours such as overt politics, favouritism, inconsistently applied rules and micromanagement of competent team members can severely damage performance and outcomes. The ability to recognise appropriateness of behaviour in different situations and roles is important to team dynamics (Belbin 2010) and having these capabilities makes for better performing project leaders (Andersen, Dysvik & Vaagaasar 2009; Bierhoff & Müller 2005; Müller & Turner 2010).

This next section briefly acknowledges the synergistic effects of combining metaphor with some of these other disciplines such as language, humour, conversation and visualisation to enhance the behavioural environment as has shown in RPC model. The interdependencies between these aspects to stimulate constructive behaviour about dialogue is an area that will benefit from further research.

Language

Insights into the power of conversation and metaphor were highlighted by von Ghyczy (2003, p. 96) who stated: *"Moreover, because language is social and metaphors are part of language, it should be no surprise that our best metaphorical thinking is done in the company of others. Perhaps most important, the discussion that a metaphor prompts shouldn't be concerned with the search for truth or validity; it should strike out playfully and figuratively in search of novelty."*

Throughout this research there was significant conversation that highlighted the fact that the Zoo metaphor created a type of language framework that enhanced the ability to understand the concepts of behavioural interactions. One participant stated (for her) this happened largely because of the level of familiarity with animals and the simplification the metaphor enabled. In formal fields of psychology there was a large volume of new words and concepts which create barriers to understanding. However, the familiarity of the animal metaphors and how animals interact enabled more intuitive flows in the conversations as they were based on prior knowledge. Although there is not a large body of knowledge to support this as a strong academic argument, in the (considerable) experience of the researcher, this “language framework” is a significant factor in the ability of lay people to quickly understand the relationships. This is especially assisted by using cartoon characters and humour (as discussed below). The synergies between these design features of the overall interventions plays a role in the positive way the participants interact when using the tool.

Humour

The theme of humour was mentioned by several research participants and its use as a strategic tool has been mentioned by other authors as well. For example de Bono has discussed jokes and humour as a form of stimulating creativity. Sala (2003, p. 16) highlighted that humour has a correlation with executive performance in stating, *"Humor, used skillfully, greases the management wheels. It reduces hostility, deflects criticism, relieves tension, improves morale, and helps communicate difficult messages."* Sala (2003, p. 17) then went on to explain the that power of good humour required a greater emotional intelligence in the comment, *"How could simply being 'funny' translate into such an objective measure of success? The answer is that it's not a simple correlation, a matter of direct cause and effect. Rather, a natural facility with humor is intertwined with, and appears to be a marker for, a much broader managerial trait: high emotional intelligence."*

The use of humour and metaphor is common in business and the humour can be positive or negative. Those that use it well have a knack for reading the situation and the audience to deliver an appropriate angle. Clearly, humour can also be badly used

and undermine the reputation and credibility of the user. So, like any tool, it is in the appropriateness of the use within the context that determines its effectiveness.

Conversation

This research has shown that engaging project team members in constructive conversations about behaviour and its impacts on performance helps to enhance performance and achieve desired outcomes. This success comes from developing awareness of behavioural interactions, creating more open conversations, stimulating stronger relationships and ultimately trust between the team members. The use of the metaphor based Reflective Performance Cycle model helps to stimulate these positive, non-political interactions by providing a means to constructively deal with the behaviour in a humorous, engaging manner and as an external object separate from specific people. However, the organisational culture can impact whether these creative ideas and constructive conversations lead to productive actions.

It is suggested that regular facilitation of conversations with aligned behaviour as defined in the RPC model through simple project interventions, will reduce the impact of project failures, especially if performed early in the project lifecycle. Early interventions create a greater awareness of the types of behaviours needed to achieve project success and also show the behavioural diversity (strengths and weaknesses) of the team. Research is continuing on the impact of this model to provide a greater body of evidence across different types of projects to support these statements. As more specific reflections from practitioners are gathered it is expected that a greater understanding of why the metaphor based model enhances project and organisational outcomes will come to light. Future research is planned to investigate how this model can be applied in projects as part of the specific behavioural development of individuals.

Images and visualisation

The fact that moving image sites such as YouTube have dramatically increased in use demonstrated how people are influenced by images and visualisation techniques,

especially where colour, sounds and message are all intertwined. The advertising industry has understood the power of this for many years and is a significant part of why television advertising is so prevalent and effective to communicate specific messages (along with the reach it brings to specific target audiences). The power of visualisation of data to evoke a richer and more influence response was described in detail by Arnheim (2004a) and later developed into more specific “Visual Thinking tools” (Arnheim 2004b). Subsequent to this Arnheim’s ideas have been developed by a range of people for applications to leverage imagery in sense-making, communication, strategy and business planning (Avison, Golder & Shah 1992; Bourne & Walker 2005; Durant-Law 2012; McIntosh 2010; Roam 2008; Sibbet 2010; Walker, Bourne & Shelley 2008). Visualisation has been taken to more advanced forms where huge quantities of demographic data are developed into moving trend charts over time to highlight changes in living standards and health statistics, as demonstrated by Rosing (2006) and McCandless (2010). These examples show how to visualise data in an entertaining way to enhance making sense of what it means and to inform decision making and action. In this research the images of the animals presented through games was found to help the meaning and sense-making for the research participants.

Synergistic combinations create opportunities

Synergies are generated when this mix of creative approaches are combined. Humour, metaphor, imagery, conversation and games were deliberately embedded into The Organizational Zoo character techniques to build an intuitive and highly creative experience for the participants. When people can positively engage and enjoy interactions about topics they are otherwise reluctant to discuss openly, opportunities open up as was seen in this research. Even in the difficult circumstances experienced in Organisation B, the level of dialogue was greater, richer and more open than normally occurred between them as was indicated by several of the participants. Even in such a political environment, the participants made many remarks about the engaging nature of the animals metaphor and how this helped them to explore some conversations that would not have otherwise been discussed and also to explore some

others more deeply than previously have been traversed. These dialogues enabled participants to learn more about each other and discover new aspects of each other that any of the individual tools (Metaphor, humour, imagery, conversation or games) would have allowed.

5.7 Emergence of the reflective performance cycle model

Early in action research cycle one of this research, a number of concepts started to come together that proved to be very useful. These related to the need to align the behaviour with the context the team were in, so that the best outcomes could be achieved. This concept developed through a series of iterations into what became the Reflective Performance Cycle (RPC) model (Figure 5.3). By the end of cycle one it was fully formed and discussed with research participants. It became a foundation tool to establish the nature of interaction in action research cycles two and three.

At the most basic level this model highlights for conversations to be value generating, people need to understand:

- the context (central platform - what part of the reflective cycle applies)
- the type of conversation appropriate to that context (divergent to generate ideas or convergent to analyse, focus and prioritise)
- the behaviours that align with generation of desired outcomes in that conversation and context
- the impact that this is likely to have on those involved and other stakeholders (and whether this will add or destroy value)

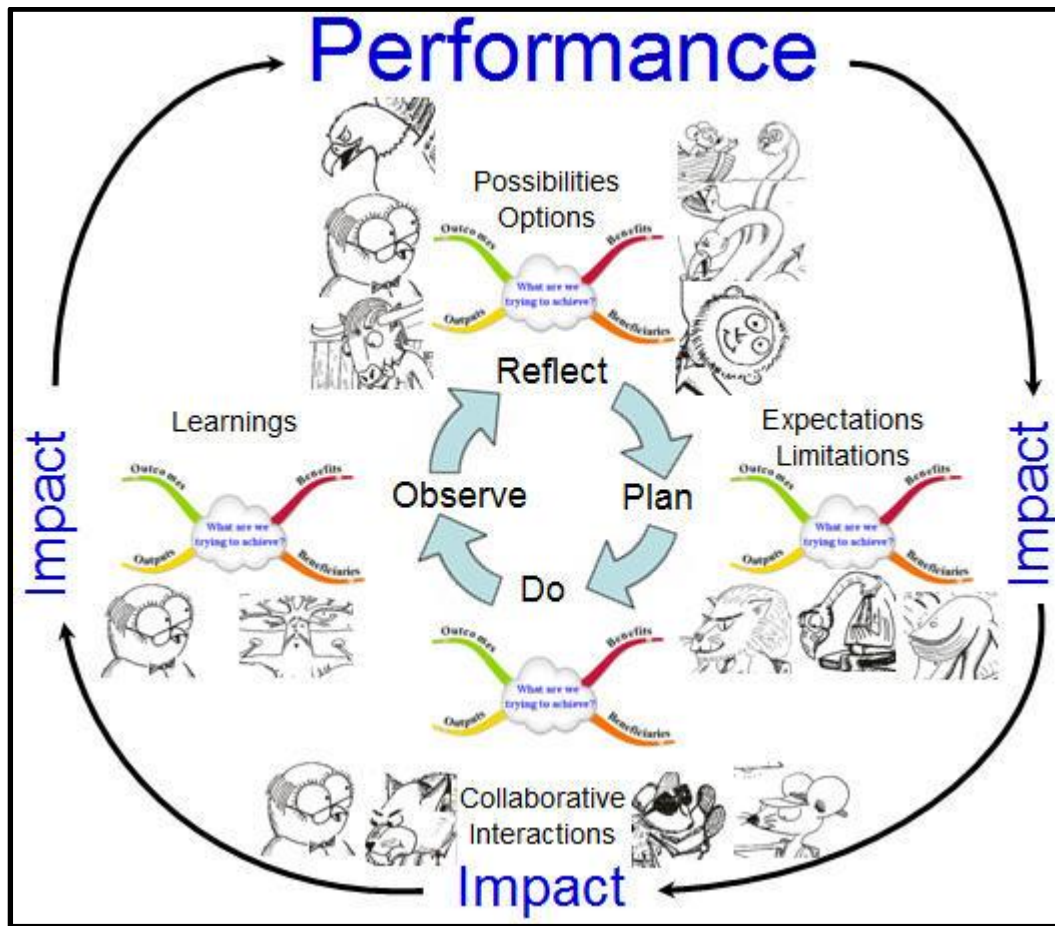


Figure 5.3 The Reflective Performance Cycle model to align behaviour with conversational context

The theoretical framework for the new Reflective Performance Cycle model (Figure 5.3) draws primarily from four different disciplines: reflective practice, conversation, behaviour dynamics, and metaphor to drive performance improvement. This work begins to support the proposition that combining some fundamental aspects of each of these bodies of literature into a single model can provide synergies to enhance project performance. The key elements of each of these disciplines being leveraged in the new model are:

Reflective practice encourages people to challenge themselves to determine if they have achieved their desired outcomes, or perhaps if something else may have been better (McIntosh 2010; Reason & Bradbury 2001). Schön (1995) argued reflections can be “on action” (after the actions are taken) or “in action” (as the action is being implemented) as different ways to learn and obtain better outcomes. Projects provide

the opportunity to reflect before, during and after the implementation. However, this is not often done to the level that it could be to achieve full learning. Projects are often rushed because of lack of time and resources, created and planned before teams are involved and not fully closed out with final reflections and lessons learnt. In the current context, people in project teams don't get the opportunity to take into consideration what has been, what is and what can be. This model provides a mechanism for these conversations to occur to make the project experience richer and the impacts bigger. The classic reflective practice model (Schön 1995) has been turned by ninety degrees to start with reflection. However, this initial reflection is more like a simulation – reflecting forward to assess what can be achieved in the project and how the behaviours displayed by those involved and the project stakeholders can improve the project outcomes.

Conversations have been used as a means of sharing concepts, transferring knowledge and creating new ideas (Ogborn & Johnson 1984). Constructive conversations can help learning and assist development of trust and relationships (Schuurman & Veermans 2001). This new model incorporates conversations as the vehicle through which these interactions can be conducted such that participants can leverage the full diversity of capabilities the team has to offer. The model highlights how the behavioural environment impacts on project interactions and which types of behaviour will enhance the quality of the outcomes and which will impede. For example, conversations during the design stages (before the project has started) work best if they are divergent in nature. That is, looking for a range of solutions that may work rather than looking for “the answer”. During this phase of the project the conversations work best if creative optimistic behaviours are used. However, when the project enters the planning phase a more convergent conversation is optimal as the aim is to reduce the options to an agreed path. The purpose of these conversations is to get the team focused on how to implement the agreed option and thereby requires prioritisation and risk assessment. These actions are better supported by more critical inward looking behaviours. In project environments such a focus on the nature of the conversations is not usually so focused on aligning the behaviours with the purpose and direction of the conversation and as such mixed behaviours and cross purposes impede the outcomes. The model offers a simple way for the team members to

consciously engage in rich focused dialogue to achieve more productive outcomes and enable greater alignment of the parties involved.

Behaviour research with respect to project management is relatively new because of the difficulties in objectively measuring the impact it has on outcomes. There has been a tendency to measure what can be objectively assessed to the exclusion of the more subjective aspects of project management. However, the investments in emotional intelligence and team dynamics (Stubbs-Koman & Wolff 2008) research over the last decade has shown that subjective aspects of management are as important if not more so than many of the more traditional objective assessments. Einstein's quote, *Not everything that counts can be counted and not everything that can be counted counts* (BrainyQuote.com 2012) highlights there is value in being aware of the implication of these subjective "human" aspects of project interactions, an argument supported by Cervone (2008). This model provides a mechanism to enable the subjective aspects of project leadership and management to be shared and discussed to help create a greater awareness of their impacts and increase how different behaviours can be leveraged in the project environment.

Metaphor has been part of human language since people have communicated. It provides a richer understanding of the knowledge being transferred between people than simple words alone (Morgan 2006). Metaphor can take the form of expressions of speech and also be embedded into other forms such as rich images (Gannon & Pillai 2010; Lakoff & Johnson 1980). A well-developed metaphor provides a richer context for the recipient as it draws from their established known patterns and experiences rather than needing to convey the entire message (Hill & Levenhagen 1995; Inns 2002). The metaphor in the RPC model comes from *The Organizational Zoo* (Shelley 2007) which uses animals and environment to represent individual behaviours and the relationships between the behaviours. This set of animals (and one plant) collectively represents the commonly observed behaviours in organisational contexts. Each animal represents an individual behavioural style that is typical of how it behaves in nature and the Organizational Zoo represents the artificial environment in which these behaviours interact. The advantage of this metaphor is it enables people to talk about the animals, rather than the person, thereby enabling a

non-political conversation about the impact of behaviours without needing to discuss specific people.

The model also borrows from Edward de Bono's (1985) "parallel thinking". Parallel thinking creates agreement on what type of conversation should be had in each situation and which cognitive approach is appropriate to optimise the desired outcomes from the conversation. The parallel thinking process suggests that all participants in the conversation focus on a specific thinking style at one time to achieve a specific desired outcome. In this model, the participants align behaviours depending on the nature of the conversation and the situation. Being conscious of the desired outcomes and discussing it briefly at the beginning of the conversation provides "permission" and encouragement to behave in the appropriate manner, which depends on if the conversation is reflective, divergent or convergent in nature.

Reflective practice, conversation and metaphor all have established bodies of literature to support they can make positive contributions to learning, understanding and relationships. This work provides a model through which these concepts can be brought together in a way that creates synergies to enhance awareness and understanding of the impact of behaviour on outcomes from human interactions. It is important to note that careful consideration should be given to the alignment of the behaviours with the context of the situation in which the conversation is being done. That is, divergent conversations at the beginning of the project to generate options should be matched with creative behaviours and convergent conversations required in planning and prioritisation need be matched with more analytical and critical behaviours. People in the conversations need to align with each other and acknowledge that critical behaviours are appropriate and give permission to be constructively critical when appropriate (and accept to hold back criticisms when not appropriate). The Reflective Performance Cycle model provides a simple image to remind participants in these conversations what style of conversation is happening and which behaviours are optimal.

The foundation of the RPC model (Figure 5.3) is that participants can pre-select which behaviours are the most appropriate to achieve the desired outcomes of each

conversation depending on the situation. Circumstances that require a divergent conversation such as brainstorming ideas for a complex issue should be matched with creative collaborative activity. However, planning or prioritising actions from such a list of options requires more convergent thinking and is optimised by analytical and critical behaviour. This highlights the purpose of each conversation and matures participant's thinking before the interaction, thereby improving the probability of success. Actively engaging with colleagues in *Conversations that Matter* (Shelley 2009) at each stage of this adapted reflective practice cycle (Reflect, Plan, Do, Observe), enables richer learning and stronger relationship development. Embedding Zoo Metaphor (Shelley 2007) into this approach enriches the understanding of the behavioural interactions for both "Reflection in Action" and "Reflection on Action" (Schön 1995). Placing reflection at the beginning of the cycle to simulate creative conversations about possible outcomes is something that some people do some of the time. However, there it is difficult to effectively simultaneously engaging in convergent and divergent behaviours, as the purpose of the conversation styles are opposite and it often leads to conflict.

Combining reflective practice with conversation structure, behavioural analysis and metaphor is unique. The implication of this model is that to consciously align behaviour to desired outcome and situation in a structured way and enables the actors to be better prepared than the traditional approach of Plan, Do, Observe then Reflect. Separating pre-reflection (simulation before the event) from planning is a critical point. Simulation is about creating and testing a range of options using divergent thinking. Planning typically is more about selecting which options from a range should be used and in what order using convergent thinking. The behaviours to be displayed in each of these conversations are very different to optimise the process. If simulation and planning are done together it is probable that useful emergent opportunities will not be developed (or perhaps even recognised).

The synergy between these four approaches generates a powerful mechanism to increase participation of team members and reveal insights of the behavioural capabilities of the whole team. Although metaphor, reflective practice, conversation and behaviour based interactions can be used alone, used together they become much

more influential and contribute more to personal and team capability development and overall performance. All four concepts help those using them to develop a deeper understanding of themselves and others and the interactions they can then have with them. This interim report and the author's ongoing research will continue to assess the impact this model and interventions based on it will have on performance (of individuals, teams and organisations).

Another significant learning point highlighted by this research is that by aligning the behaviours with the context as indicated in the RPC model, it is possible to develop series of interactions that develop relationships over time that lead to stronger and more robust relationships. If a team actively did this for periods longer than this research was operating for in one environment, the researcher suggests that this could lead to an improvement in performance as is indicated in Figure 5.4. Although further research is required to build a stronger case for this flow, the logic presented in this image is entirely plausible and logical to the experienced practitioner.

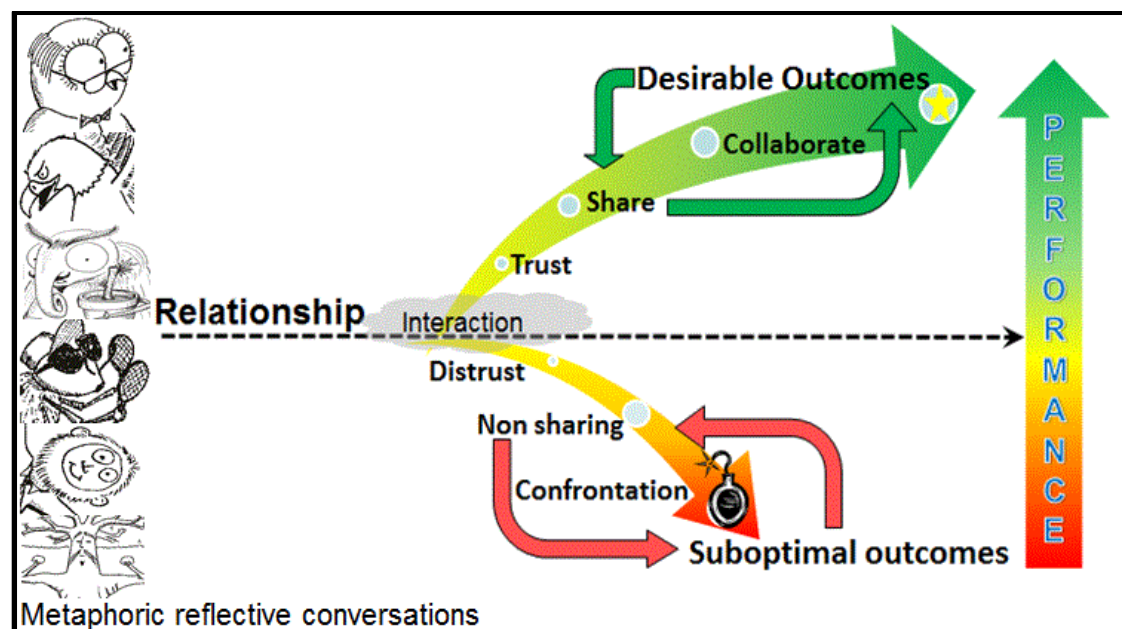


Figure 5.4 Impact of behavioural alignment and misalignment

Figure 5.4 reinforces the value this research can have for individuals, teams and organisations involved in implementing projects and for wider society in general (because it seems plausible that such a flow could apply in many other relationship situations). The basic logic of this image was derived from observations made in the

research and by watching what happened from a range of conversations in different situations (through the RPC). Example reflections in this research support the premise that successful management the behavioural environment can be achieved by investing time and energy reflecting on HOW one should behave to lead the environment in advance of the situation. That is, it is more effective to plan how to behave in advance based on your assessment of the stakeholders and the desired outcomes, than to wait and see what happens. This of course works best with significant reflection and perhaps even rehearsing with another colleague to get different perspectives. It is always beneficial to maintain some flexibility, just in case the situations is not what was expected, in which case a more emergent approach is advised. This ability to sense the characteristics of complex situations and adjust as one proceeds is what putting the “Reflection in action” (Schön 1995) into place and also assists in sense-making to obtain improved outcomes (Weick 2001; Weick & Sutcliffe 2011).

By assessing the people involved and thinking about the desired outcomes it is possible to increase the chances of achieving outcomes through adapting your behavioural approach. This way the planned behaviour draws followers into the dialogue in a manner they are comfortable with rather than leading to conflict. Thinking about the people involved in advance and confidently displaying considered behaviours can set the mood of an interaction (meeting, discussion, review etc.) in a way that adjusts how participants perceive the situation. By deliberately creating the behavioural environment to leverage the situation you have a greater influence on outcomes. However, to take advantage of others for your own benefit is clearly inappropriate and immoral. It diminishes trust leading to conflict through a negative path as shown in Figure 5.4. However, if your focus is to invest in developing a mutually beneficial relationship for all parties, then such “manipulation” of the behavioural environment is a positive approach that should lead to higher performance.

In many instances in this research behavioural metaphors were deliberately applied through the RPC to enhance creativity and build rich insights into how to optimise interactions and idea generation. This aligned behaviour with purpose to combine

simplicity, a trusting and sharing environment, creative metaphor and constructive conversation. Participants intuitively engaged with each other to develop positive interactions which generated trust which in turn increased knowledge transfer and collaboration and ultimately enhanced performance (as seen in the positive trajectory in Figure 5.4). One question to ask again at this point is the role of the “Hawthorne Effect” (refer to potential limitation 2, discussion in section 1.6). It may not be possible to “prove” that the perceived enhancement in outcomes were directly due to the metaphor interventions or the fact that they were being observed. However, the participants (and the researcher) believe the use of the metaphor enabled greater reflection, sensemaking and conversations around the impact of behaviour, and this provided greater insights into the behavioural environment. Therefore, it is plausible that the metaphor interventions provided a better foundation for conscious decision-making.

Having such Conversations that Matter about what behaviour is, and is not, appropriate in each situation leads to better outcomes. Reflecting BEFORE behavioural interaction provides the opportunity to create a better behavioural environment and circumvent potential clashes before they occur. Not conversing about behaviour creates the opportunity to misunderstand each other, and can lead to inappropriate mix of behaviours that are not aligned with the desired outcomes.

5.8 Chapter Summary

Chapter Five has brought together the research data in ways that helps the reader make sense of the research. The data has been collated in a variety of ways, using a combination of qualitative and quantitative methods, to highlight what the most important findings are. This has been done to align with the philosophical approach defined in Chapter Three and to ensure that the data was handled and interpreted in a consistent manner that truly represents what happened (that is, removing potential for bias and misrepresentation). The chapter shows how the iterative cycles of action research lead to a growing richness of understanding over time as each cycle informs the next and builds the competency of the researcher in performing the research.



Figure 5.5 Word cloud for Chapter 5, visually demonstrating main themes

Details explaining the origin of this image refer to Figure 1.2 at the end of Chapter 1

Chapter 6 Thesis Conclusions

6.1 Chapter Introduction

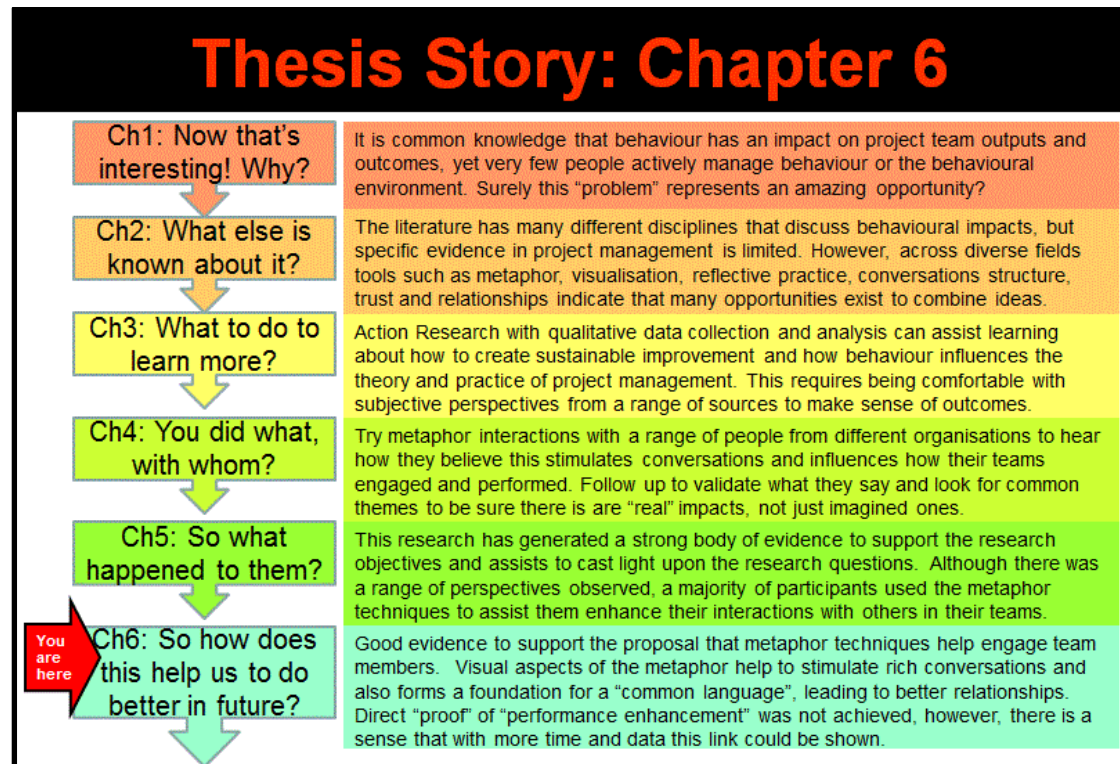


Figure 6.1 The story of this research: a flow through the stages of the research

This chapter brings all the others together and returns to the beginning to ask “did the researcher really achieve his objectives and was he able to adequately answer the research questions with a logical and evidence based argument. The chapter then leads the reader though a discussion highlighting the main purpose of this research – to show how metaphor based techniques make a positive contribution for project team members, the organisations that implement projects and the wider profession of project management.

6.2 Achievement of research objectives

The research objectives detailed in section 1.4 have been achieved in this research as is detailed below. A significant body of evidence has been gathered to support understanding more about the research questions as discussed in sections 6.2 to 6.4. This evidence is considered both rigorous and relevant because of the approach and

measures taken in this research. That is, it primarily focused on the data and interpretations provided by the research participants rather than relying on the interpretation of the researcher.

The evidence in the following paragraphs provides more specific insights that specifically demonstrates how the research objectives have been addressed:

Research objective 1: Identify a suitable (intuitive) metaphor-based technique that could be used as a model for this behavioural research.

This research was met by demonstrating several interventions based on the metaphors of *The Organizational Zoo* were effective in engaging people in constructive dialogue about behaviour. These methods were found to be intuitive to participate in when facilitated by an experienced practitioner. Some individuals were able to apply the techniques without further assistance to generate positive outcomes in their own environment (as shown by collected reflections). There was however, no reluctance amongst others to try to implement their own interventions until further supported experiences developed their familiarity with the methods and built their confidence with the techniques.

The emergence of the Reflective Performance Cycle from this research offers a more sophisticated approach to adapting the basic interventions to suit the context and assists in achieving enhanced outcomes from these.

Research objective 2: Develop a series of interventions based on this metaphor and assess the impact it has on the team relationships and their relationships with their stakeholders.

This objective has been achieved as shown in research instruments described this thesis (section 3.8). This section lists the interventions successfully applied in this research. Also a chapter published during this research describes how more advanced versions of these are being applied in commercial practice by practitioners (Shelley 2011).

Research objective 3: Apply these interventions in real project situations across four different organisations as part of an action research program to answer the research questions (highlighted in Section 1.5)

This objective has been achieved as described by the case studies detailed in Chapter 4, supported by the data and analysis in Chapter 5. These cases provide a set of data that is both relevant, as they were derived from real cases in action research, and rigorous in that the way in which data was collected and interpreted was generated from the participants.

6.3 Research question responses overview

The “big picture” is:

- In all four organisations there was far more supportive evidence than neutral or negative as shown by categorising of statements in Table 6.1 and Table 6.2
- There were many reflections collected that showed evidence of impact when the methods were applied (see detailed artefacts in appendices)

The consistency of positive responses across the four organisation about the effectiveness of metaphor to make a difference for the research subjects helps to build confidence in the robustness of the data. Triangulation (see section 3.9) of the organisational findings with the independent practitioner’s perspectives reinforced this robustness and provided another aspect of relevance to the perspectives. There were several challenges in conducting this research, which highlights the difficulties facing business researchers in the current economic environment:




- Half of the organisations who opted in originally, did not participate – requiring new organisations to be engaged
- All 4 organisations in the research went through significant restructures during or immediately after the research that had a direct impact on some or all research participants (depending on the organisation)

- Several research participants left the organisation during or not long after the research was done, making any longitudinal study impossible
- Difficult to get specific times agreed to do agreed interventions, and almost impossible to get any additional time or activities done (despite significant interest in the techniques)
- Hard to achieve consistency when only have such sort time with research subjects (limited mindshare and competing with tasks)
- Challenge of balancing learning activities with research data gathering (they want to learn and do, researcher wants to gather and reflect)

These difficulties directly impacts on the ability to answer the research questions as thoroughly and completely as one would like. This is especially the case in attempting to look at the longer term aspects of the impact on the organisational performance or project outcomes. However, despite these difficulties, there was still sufficient data generated to provide good support for the first two questions. These can be given a clear yes and backed up with examples from the responses to explain how the metaphor was able to support better outcomes. Although there was less support for research question 3 (how does a team operate more effectively by using metaphor...), there was still sufficient data to support this may be the case and justify further research to gather additional evidence. The relatively short term nature of a PhD window did not allow for this data to be gathered within the scope and timeframe.

It is clear from Table 6.1 that there is strong support for the research questions and very little dissention and that this is consistent across the organisations. The full statements and how these have been categorised can be viewed in the tabulated results of the thesis in chapter 5. The statements and their supporting reflections describe HOW the research participants applied the metaphor techniques and what happened as a result of these. Although there was one person (from a total of 48) that had a negative experience, the vast majority across all four organisations reported positive experiences with the techniques when they were used. There were also some neutral (neither positive nor negative) responses to these questions.




Table 6.1 Categorised research subjects’ responses to research questions in final focus group

Question	Org			
How is the stakeholder engagement process enhanced through the use of metaphor tools?	A 7	7	0	0
	B 8	6	1	1
	C 11	7	0	0
	D 22	18	3	1
How can project team members influence outcomes more effectively by better targeting stakeholder behaviours?	A 7	7	0	0
	B 8	5	2	0
	C 11	8	0	0
	D 22	20	0	0
How does the team operate more effectively by using metaphor to help align roles or tasks to team member.	A 7	5	0	0
	B 10	6	2	0
	C 11	9	0	0
	D 22	15	5	1

Note: “Org” column is the organisation followed by the number of research subjects in that organisation. Number in the “positive (☺), neutral (☹) and negative (☹) columns is the number of answers in each of these categories from that organisation.

Because on the positive responses in action research cycle two, some specific aspects of HOW metaphor worked prompted additional questions that may help to illuminate more understanding on the mechanisms. As a result of these insights some additional questions were included in the survey in cycles two and three. Categorised answers to these are provided in Table 6.2 and full statements can be found in the tables in the results section. Such adjustment of emphasis is normal in action research and shows why the somewhat iterative action research cycles are powerful. It allows a focusing in on some trends to provide more specific data.

Table 6.2 Categorised research subjects' responses to additional research questions in final focus group

Question	Org			
How do our behaviours benefit us and create limitations for us, as a group? Did the metaphor characters assist this understanding? If so, how?	A 7	-	-	-
	B 10	-	-	-
	C 11	8	0	0
	D 22	15	7	0
Can the metaphor characters assist me to develop better relationships given my behavioural preferences? If so, how might I do that?	A 7	-	-	-
	B 10	-	-	-
	C 11	8	0	0
	D 22	14	6	2
Do you believe that the model combining reflective practice, conversation, and metaphor will be useful for your own thinking and behaviour?	A 7	-	-	-
	B 10	-	-	-
	C 11	-	-	-
	D 22	11	10	1

Note: “Org” column is the organisation followed by the number of research subjects in that organisation. Number in the “positive (☺), neutral (☹) and negative (☹) columns is the number of answers in each of these categories from that organisation.

6.4 Response to research question 1

How is the stakeholder engagement process enhanced through the use of metaphor tools, and if so how?

There is a strong consistent theme across all four organisations that the metaphor methods can (and in some cases did) make a difference to at least some stakeholder engagement situations. It is plausible that with time and greater experience in use of the techniques, the ability to influence stakeholders through application of the metaphor techniques could increase. This statement is supported by the fact that the independent practitioners, who have greater experience with the techniques, were able to provide more cases where stakeholder engagement was effective.

The volume of data that supports the effectiveness of the techniques for understanding and influencing stakeholders is much greater than any commentary that did not believe this to be the case.

How this happens varies with the people involved and the situation. Some research participants found the Organizational Zoo metaphor a useful framework through which to understand the complexities of behaviours. Others saw it as a form of language through which rich meaning could be transferred in a simple and intuitive way. There was strong support for the idea that the metaphor helped to depoliticise the conversations by enabling the behaviours to be discussed independently from specific people and focus on the impacts of the behaviour rather than who was displaying it. There were comments supporting the idea that imagery and humour (through the use of cartoon characters) helped the creativity of the conversations. These characters being based (mainly) on familiar animals enabled them to more easily remember the spread of behaviours observed in the workforce than they had previously been able to describe. This increased awareness also increased the richness of the conversations through enabling games to be played with the cards about how the characters might interact through miniature role plays.

6.5 Response to research question 2

How can project team members influence outcomes more effectively by better targeting stakeholder behaviours, and if so how?

This research generated a body of evidence to show that proactively assessing the behavioural style of their target stakeholders assisted the participants to understand them better and therefore more effectively influence them. There were several cases where decisions were taken that would have been more difficult to achieve without the involvement in the preparation for the engagement with the stakeholder. There were some research participants that did not attempt to apply the techniques due to lack of confidence or simply not identifying with the techniques for their situations, but these were in the minority. As with any new technique, variable rates of adoption can be expected, especially across a range of organisational cultures and with a variety of individual people with different styles and preferences.

The insights into how the metaphor assisted participants to influence were very aligned with the reasons highlighted for question one. Namely, metaphor stimulated conversation structure providing richer insights, developing a deeper understanding of those they are attempting to influence (thereby reducing barriers to change), the use of

humour to reduce potential friction and the ability to depoliticise the situation and talk about behaviour and its impacts without getting personal. Reducing the potential for such emotive aspects of relationships, enables the conversation to remain focused on the desired outcomes and be less likely to become derailed.

6.6 Response to research question 3

How does the team operate more effectively by using metaphor to help align roles or tasks to team member, and if so how?

There evidence from this research to supportive that this is the case, but further evidence would be useful to make a stronger case. There is no doubt that the relationships and interactions were enhanced in Organisations A and D during the research interventions. However, there is insufficient evidence to create a strong argument that stronger alignment of roles and tasks was specifically generated by the use of the metaphor interventions. There is no doubt that any intervention that brings people together in a creative and constructive environment will assist team dynamics. However, there were many comments that praised the creativity of the metaphor and supported that is helped to create the environment that encouraged them to actively contribute. These provide confidence that with more time and exposure to situations for longer periods of time to develop confidence in the use of the techniques, a more robust body of evidence could be generated. Again, the body of supporting evidence was greater than the few comments that did not support this proposition an there was no evidence to refute it.

How the metaphor influenced team dynamics was aligned with the earlier findings and some participants highlighted the synergies between humour, conversation, language and metaphor. The insights into these synergies are stronger for the, greater experience and deeper understandings of the independent practitioners. Their more reflective approach and greater investment in desired outcomes provided more robust support for what can be achieved with metaphor around team dynamics.

6.7 General observations on qualitative case studies

Section 6.3 highlighted some of the organisational and economic challenges with undertaking quality research in organisations. They only allow minimal time to

engage with research that does not produce direct benefits to their daily short term tasks. Anything that requires more than minimal input and time from functioning organisations (government or corporate) is a real challenge. In modern society with rapid change and lean organisational structures, many people barely have time to complete what they are responsible for without taking to do work which may be perceived as additional tasks. Although there is a willing support for the concepts, when it comes down to actively participating in the interventions and completing agreed actions, many people struggle to deliver on commitments due to competing priorities. This phenomenon has also been reported anecdotally widely in the research community and also formally discussed in published works (Mumford 2001; Saunders, Thornhill & Lewis 2009). This aligns also with the theory of planned behaviour, where people have genuine intent to act, but fail to do so. The rationale for the Theory of Planned Behaviour is the salient beliefs underlying attitudes, subjective norms and planned behavioural change, influence intentions and ultimately behaviour (Ajzen 1991). However, there is often a reported discrepancy between intent and actual displayed behaviour (Sniehotta, F 2009). Sniehotta (2009) engaged in a detailed statistical study of students intention to participate in sports and recreational activities and indeed found that aspects commonly associated with normative beliefs did in fact influence intention, but did not necessarily lead to actual action. Key factors assessed in this study were that students report that not having somebody to actively participate in physical activity with them is a major barrier. Also, students who do participate find that they meet like-minded people, which creates the necessary level of social approval and support to encourage them to continue.

Other researchers from sports and health disciplines have supported the observation that research participants who have a genuine intent to change behaviour at the time of participating in research, can fail to carry this intent through to action afterwards (Chatzisarantis & Hagger 2005; Webb & Sheeran 2006). A similar “knowing – doing gap” was highlighted to be a common problem at both individual and organisational levels discussed by Pfeffer and Sutton (2000).

As Johann Wolfgang von Goethe stated a long time ago (BrainyQuote.com 2012):
“Knowing is not enough; we must apply. Willing is not enough; we must do.”

Whilst it is good to have a stated intent, the benefits only flow when the stated intent is put into action. For this to happen the right conditions need to be provided such as peer support and at least some stability and willingness to persist with new techniques when still learning them. If project managers and leaders want to enhance the social interactions they will get better outcomes by supporting the social environment where people can experiment and become comfortable with new ideas and concepts. Examples of organisations where time is invested to “play” with new ideas and engage in creative conversations, such as IDEO (www.IDEO.com) (Hargadon & Sutton 1997; Leavy 2005) and Google (Kuntze & Matulich 2009) have generated significant benefits and been a driver of innovation.

6.8 Further research

Longitudinal study of the cases presented.

Research on the impact of this model and metaphor techniques to provide a greater body of evidence across different types of projects will assist to support these statements. As more specific reflections from practitioners are gathered it is expected that a greater understanding of why and how the metaphor based model enhances project and organisational outcomes will be established. Future research is planned to investigate how this model can be applied in projects as part of the specific behavioural development of individuals.

Testing interventions in other situations and organisations such as a merger or acquisitions.

Each piece of research is a stepping stone of knowledge and a foundation for the next stage of learning. Whilst it would be ideal to generate even more data across more organisations, the reality is there is a limit to what can be done in one PhD. The metaphor techniques continue to be used in commercial practice by the independent

practitioners and the development of techniques will continue through the researcher's ongoing practice and research.

I hope I can engage other students to continue to generate more data form other contexts and find some cases where more longitudinal data can be gathered to demonstrate the long term impacts of continued use of the techniques in a stable environment. Such data will increase the confidence the techniques can have a lasting effect on more permanent workforce environments.

Cross cultural applicability of metaphors

The author has personally used the metaphor characters to stimulate professional conversations about behaviour in Australia, Singapore, Malaysia, Vietnam, United Kingdom, United States and Estonia. Some of the interactions has involved quite diverse cross cultural groups including ARLEMP (Asian Region Law Enforcement Program) which has representation from eighteen different Asian nations, RMIT University's MBA program which attracts students from across Asia, into the Middle East and also some European and South American countries and Edinburgh University's Masters of Organisational Learning with a similar spread of cultural diversity. Other practitioners have also used these metaphors in several Asian countries including Hong Kong.

During such professional development interventions the general feedback is that the metaphors, once given a basic introduction, are quite transferable across the cultures. However, there have been some differences in how some of the animals "behave" (that is, what behaviours they would be associated with in their country and what idioms they would be used in to express rich meaning). An example of this includes how the Owl is perceived in Vietnam and China compared to the association with knowledge that is common in English based western cultures. Zhang (2011) struggled to find equivalent (common) Chinese words that were equivalent to those used as the characteristics of some of the animals. She also found that some animals were either unknown or not well known in common Chinese vocabulary. In translating the characters and their attributes, she needed to discuss several of the

words with colleagues to discover equivalents, so that the meaning could be accurately transferred. Another observation is whilst most animals are reasonably cross-cultural, there are some that can have a different meaning associated with them. One example is the owl, which in Chinese is often associated with bad luck rather than knowledge. Whereas in Vietnam, the owl is associated with a person who is overly interested in other people's business, that is, nosey behaviour or a gossip (Hong 2011).

A similar experience was reported by Hong (2011) who researched equivalent terms or “cultural words” between Vietnamese and English. Both translators reported that the animals could be understood if discussed in familiar terms so that people will understand. However, sometimes there is a challenge in finding the right word to express the appropriate sense of the animal/behaviour in the alternative language. They also highlighted that whilst many of the animals are intuitively recognisable, their cultures have their own iconic animals that are commonly used in idioms to express behavioural types. For example, in Vietnam, the buffalo is commonly used as is the Panda in China. Dragon, snake other animal characters of the eastern zodiac also have specific behavioural types associated with them and are often referred to express a behavioural type.

There is an opportunity to research further to see just how common a set of metaphors can be across a wide range of cultures and whether a single set, such as used in this research, could be used generically to support professional development in groups of mixed ethnic background. It may be that a well-developed set of metaphors could help to simplify meaning and understanding across cultural boundaries in learning and development situations or in multicultural projects.

6.9 Overall thesis conclusions

We live and work in an era where people “just want the key point”, or at most a one page executive summary. So, I thought that it is appropriate to add at the end a short statement to summarise what all the fuss is about. This is an attempt to engage you to invest some time to read more of this thesis and gain a greater benefit from it. So, here is what I invested three years of my life trying to figure out and why I believe it will be of benefit to others:

Engaging project team members in constructive conversations about behaviour and its impacts on performance, helps to enhance the team dynamics and also assists us to understanding how to achieve desired outcomes together. The improved team dynamics comes from developing awareness of behavioural interactions, creating more open conversations, stimulating stronger relationships and ultimately trust between the team members. The use of the metaphor-based Reflective Performance Cycle model helps to stimulate these positive, non-political interactions by providing a mechanism to constructively engage the appropriate behaviours in a humorous and creative manner. Metaphor enables the behaviours to be treated as an external object separate from specific people and in a somewhat more objective and non-political way. However, the organisational culture can impact positively or negatively on whether these creative ideas leverage behavioural diversity (strengths and weaknesses) in the team to generate constructive conversations that trigger productive actions.

It is suggested that regular application of this model through simple project interventions, will reduce the impact of project failures, especially if performed early in the project lifecycle. Early interventions create a greater awareness of the types of behaviours needed to achieve project success.

I believe the time is right for this to be a foundation of the next evolution of project manager education and capability development. I have no doubt that if project managers understood how to actively use metaphor, they would be better at their jobs, less stressed, deliver better outcomes more often and more widely respected by their teams.

6.10 Chapter Summary

This chapter draws the research to a close and highlights the contributions to knowledge that it delivers (discussed further in Appendix 1) as well as where future research may be done to further these ideas to assist the professional development and performance of the project management profession. The research has shown that by drawing from a range of different tools and techniques across disciplines it is possible to create base simple intuitive activities, from a complex model, for teams to “play” in a way that will enable them to enhance their awareness of the impact of behaviour on team interactions. Although it seems logical and plausible that this increased awareness of the behavioural aspects of team environments would lead to performance enhancement and reduce stress, there is insufficient data in this research to make such a direct claim. However, the ideas suggested in the further research areas may well make this connection more robustly given more time and effort.



Figure 6.2 Word cloud for Chapter 6, visually demonstrating main themes
Details explaining the origin of this image refer to Figure 1.2 at the end of Chapter 1

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Appendix 1 New contributions to the body of knowledge

There are several new contributions to the body of knowledge from this research that may be applied in a range of disciplines. The key ones are listed below followed by a brief explanation about how they were developed and refined. At the end of this appendix this thesis and the research it presents is assessed against the Australian Qualifications Framework (Australian Qualifications Framework Council 2011) to highlight (from the author's perspective) how the research complies with each of the requirements for the conferral of a Doctorate of Philosophy.

Key contributions to knowledge from this research:

1. Reflective Performance Cycle Model
2. Intuitive metaphor interventions to stimulate constructive conversations
3. Reflective diary for action research data gathering

Reflective Performance Cycle Model

This model was conceived in the early stages of research cycle one. As a result of the first two interventions, it was apparent that the research participants would benefit from a model that clarified the alignment between the situation the project was in (what stage of the reflective practice cycle they were at), the type of conversation required given this context and the behaviours required to secure the desired outcomes. The logic of the model is explained in full in section 3.6 research instruments and the full model represented in Figure 5.3.

This model offers a clear way to plan and execute the right type of conversation in the right time with the right stakeholders using the optimised behaviours, thereby forming a pragmatic framework through which to embed reflective practice in a constructive way into project management practice. It represents an intuitive and productive way to take existing theory (Reflective practice combined with behavioural studies) and build the effectiveness of project practitioners. Since being created it has been successfully used to stimulate and guide many discussions both within this PhD research as well as at academic conferences and professional practice workshops.

The benefits of using models that include behavioural aspects to enhance project performance have been previously proposed, including one based on quality systems (Bryde 2003) and a comprehensive stakeholder model was developed by Bourne and Walker (2005). Introduction of this Reflective Performance Cycle model created enthusiastic discussion and positive interactions in both organisations researched. The majority of people from both organisations were positive about the model and how it could be applied, although in each there was also one person that saw the model as having little relevance to them or the organisation.

Intuitive metaphor interventions to stimulate constructive conversations

Although there is increasing number of publications highlighting the importance of behavioural aspects of managing projects, there is very little literature on **HOW this can be managed**. Project managers are “advised” in the literature to manage behavioural aspect, but not informed on what this requires. The most commonly used project manager training document worldwide - the PM-BOK otherwise known as Project Management Institute Body of Knowledge (PMI 2008), states that such things should be done, but offers no processes or suggestions on how to do so. There is a need for pragmatic interventions that enable the project manager to better create the behavioural environment that leads to aligned team and good team dynamics, but the reality is there is little research on what works. Whilst there are generic “management games” that do help teams to interact better and a number of more sophisticated behavioural assessment and profiling tools, there generally require specialists to implement them and they are often quite costly (not covered in a normal project budget). Often these are implemented as independent events rather than as a developmental program over time, designed to build behavioural capabilities throughout the project (as a more aligned and comprehensive learning experience).

Furthermore, there is no research or literature on the use of creative techniques to stimulate constructive conversations about behaviour. This research introduces several interventions that can be implemented, in series to build behavioural awareness of each team members and enhance their capabilities to leverage behavioural diversity. The value of using projects as a vehicle for learning has been

highlighted by a number of thought leaders in project management, and these metaphor interventions provide a simple and intuitive way to achieve this outcome.

Reflective diary for action research data gathering and classification

Collating data through gathering reflections from participants or observers is not new. However, incorporating metadata tagging into a reflective diary by the participant at the time of recording is new. The Reflective Impact Diary enables the research participant to document their own observations from the interaction in a standardised format across a range of predefined criteria. This approach enables the researcher to gather a much richer level of data and to get insights about the impact of the interaction from the research participants' perspectives, making the data collection more objective and providing greater insights. It means the researcher can manage the data more objectively and use the insights and sense-making of the research participants more effectively. It distances the researcher somewhat from the data and reduces the influence their own filters and biases when interpreting the data and its meaning. The RPD was initially developed in the design phase of this research and the slightly adjusted in form and layout after cycle 1. This was mainly to make it easier to use electronically and also to cater for the unexpected majority preference to use the dairy in hardcopy and write comments in manually.

Examples of reflective diaries are provided in Appendix 4 and summaries versions of the data they generated tabulated throughout Chapter 4. This method of data collection and classification offers a simple and pragmatic way to objectively collate rich data from research participants and hopefully will become a common tool in qualitative research.

Table A1.1 Assessment of thesis against Australian Qualifications Framework requirements (Australian Qualifications Framework Council 2011)

Framework criterion	Learning type outcome descriptors	Self-assessment by researcher
Level	10 (Doctorate of Philosophy)	Achieved - based on evidence below
Summary	The Doctoral Degree qualifies individuals who apply a substantial body of knowledge to research, investigate and develop new knowledge, in one or more fields of investigation, scholarship or professional practice.	The researcher actively engaged in research to develop new knowledge in the area of behavioural method development using metaphor techniques. This research is both leading edge and new. New research concepts and models developed in the course of this PhD are listed in this section immediately above this table. These techniques have already been successfully applied in both academic workshops and lectures and professional practice.
Knowledge	<p>Graduates of a Doctoral Degree will have:</p> <ul style="list-style-type: none"> * a substantial body of knowledge at the frontier of a field of work or learning, including knowledge that constitutes an original contribution. * substantial knowledge of research principles and methods applicable to the field of work or learning. 	<p>The understanding of how metaphor based interventions helps to engage teams in constructive conversations about behaviour is completely new to the fields of leadership, management and project management.</p> <p>The research in this study shows that these techniques help project and management teams to work better together and provides a new body of knowledge to support that metaphor methods can apply in business and project environments.</p> <p>The use of action research principles to generate the data and guide the learning of the research participants has shown these methods to be useful to support learning and development.</p>
Skills	<p>Graduates of a Doctoral Degree will have:</p> <ul style="list-style-type: none"> * cognitive skills to demonstrate expert understanding of theoretical knowledge and to reflect critically on that theory and practice. * cognitive skills and use of intellectual independence to think critically, evaluate existing knowledge and ideas, undertake systematic investigations and reflect on theory and practice to generate new knowledge. * expert technical and creative skills applicable to the field of work and 	<p>The researchers expertise, knowledge and skills have been demonstrated through the design, planning, implementation and interpretation of all the interventions performed in this research.</p> <p>In order to achieve these research outcomes, the researcher has demonstrated application of theoretical and practical skills through:</p> <ul style="list-style-type: none"> * Extensive review of the literature (Chapter 2), developed a research methodology (Chapter 3), applied creative skills in a unique research

	<p>learning.</p> <ul style="list-style-type: none"> * communication skills to explain and critique theoretical propositions, methodologies and conclusions. * communication skills to present cogently a complex investigation of originality or original research for external examination against international standards and to communicate results to peers and the community. * expert skills to design, implement, analyse, theorise and communicate research that makes a significant and original contribution to knowledge and/or professional practice. 	<p>approach, applied analytical skills in assessing and interpretation of the data generated (Chapter 4)</p> <ul style="list-style-type: none"> * Significant communication skills to write this thesis, write and present two conference papers and review the research progress at two Doctoral Colloquiums and several workshops/progress reviews. Feedback for these activities has been consistently positive. * The originality of the metaphor methods has been discussed in the earlier section and has been published in a chapter of a 2011 peer reviewed book in the field of project management (stakeholder management focus)
Application of knowledge and skills	<p>Graduates of a Doctoral Degree will demonstrate the application of knowledge and skills:</p> <ul style="list-style-type: none"> * with intellectual independence * with initiative and creativity in new situations and/or for further learning * with full responsibility and accountability for personal outputs * to plan and execute original research * with the ongoing capacity to generate new knowledge, including in the context of professional practice 	<p>As this research degree was conducted using action research, the entire program has required the researcher to apply the techniques over the three year period with full independence.</p> <p>Each intervention with each of the four research clients was a unique emergent and creative situation that required deep skills in the area and adept leadership/facilitation.</p> <p>The researcher took full responsibility and accountability for all interactions throughout the research from selection and invitation of clients to join the research, right through to their debriefing at the end of the research.</p> <p>This research has continued beyond the scope of this PhD with the techniques already being applied in professional and academic workshops in England, Scotland, Singapore, United States of America, Australia, Abu Dhabi (UAE) and with further workshops planned in UK, Malaysia and Ireland during 2012</p>
Volume of learning	<p>The volume of a Doctoral Degree is typically 3-4 years.</p>	<p>Researcher was enrolled full time in the PhD program for both semesters of 2009-2011 inclusive and submitted the thesis for examination at the beginning of the first semester in the fourth year of study.</p>

Appendix 2 Reflections on learning through action research

Action research provides a unique opportunity for the researcher to engage with research subjects to introduce and develop new ways of thinking and acting on how they do their work (McIntosh 2010). This PhD work highlighted just how rich this experience can be for all parties involved. To be able to interact with others in an environment/interaction designed for learning, which simultaneously operates as research is intellectually stimulating. The researcher learns with the research participants, but at a different level. Whilst they learn the principles of the interactions and react to them, the researcher is learning about how their designed interaction worked and from the reflections the research participants about how it impacted on them.

Other actions researchers also reflect on the richness of action research and how it provides data that has provides deeper and richer insights than traditional quantitative research (Booth 2011; Durant-Law 2012; McKay & Marshall 2001; Steinfort 2010; Zuber-Skerritt 2002).

Appendix 3 The metaphorical image of this thesis

This thesis represents a very late chapter in a lifelong learning journey. Starting a career as a more positivist orientated scientist and working in “logical management style commercial organisations, the author gradually came to learn that there was more to performance than logic and “hard” fact based decisions. My experiences through 25 years of working in different parts of the world highlighted that people are far more complex than can be explained by simple cause and effect alone. I directly experienced, and could observe in others, that emotional aspects significantly impact how humans interact with each other and heavily influenced how they make decisions. It also became apparent that creativity through shared reflection, conversation, humour, imagery and visualisation can all significantly enhance the learning experiences and assist the development of social capital.

These learnings were pulled together in my approach to understanding my journey through the PhD. Early in the journey, I sketched an image of what I thought were the relevant threads informing what I needed to do displayed as Figure A3.1.

Throughout the journey there were several versions of this image redrawn as the emphasis adjusted to an emergent journey and influenced my sense-making process. Some things that I initially thought would be critical to the research program eventually turned out to be irrelevant and others that I had not made the connection to early, came to be important. The series of iterations eventually created a much more informed and structured final image (Figure A3.2). Perhaps this will be the foundation of further iterations as I write some papers from this research and which will grow to form some new branches and further reflection will make other connections.

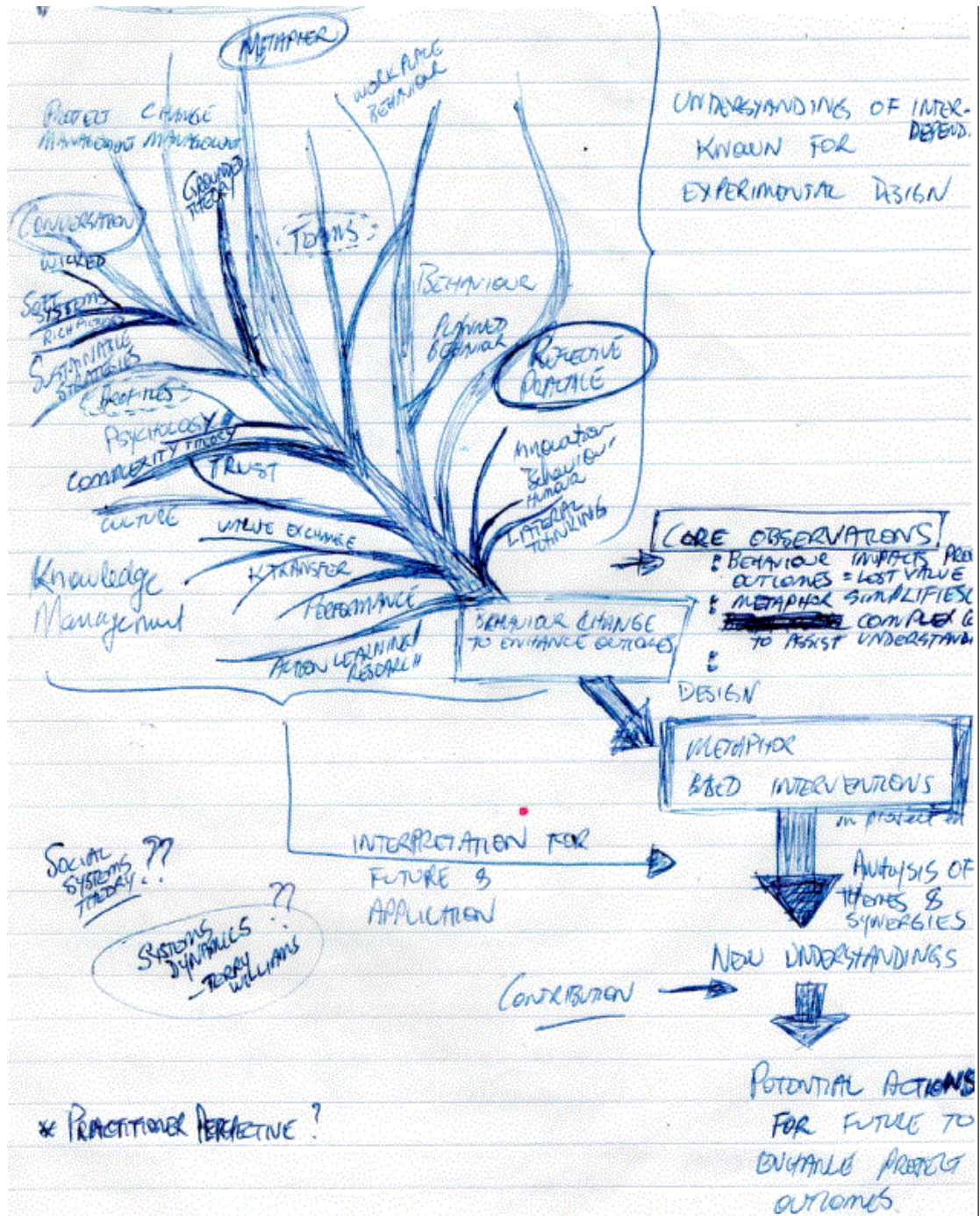


Figure A3.1 Initial draft of ideas for the research to highlight potential influencing factors

Appendix 4 Examples of data and collection formats

This appendix provides an example of the blank data collection forms and examples of completed forms. One example is provided from each of the practitioners (examples 1-8) and there are two from each of the research organisations.

Figure A4.1 Blank Impact Reflection Diary

Impact Reflection Record

Please replace X in footer with your "Person Number"

Date:

Headline: <i>The essence of what happened in a few words</i>	
Situation: <i>Background, what happened, who was involved, what behaviours will be best/were displayed</i>	
Impact: <i>Describe how will this make a difference</i>	
Outputs	Benefits
Outcomes	Beneficiaries
Reflections: <i>What do you think and feel made this experience worth recording</i>	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i>	
Meta-tagging: <i>Scaled categorising for analysis</i>	
Did you plan this interaction in advance?	<div style="display: flex; justify-content: space-between;"> Impromptu Fully Pre-planned </div>
Did you get what you planned for?	<div style="display: flex; justify-content: space-between;"> Less than expected As expected More than expected </div>
How did you feel about this experience?	<div style="display: flex; justify-content: space-between;"> Negative Neutral Positive </div>
What impact did this experience have?	<div style="display: flex; justify-content: space-between;"> Unhelpful Helpful for me Helpful for others </div>
What tools stimulated or influenced this interaction? <i>Circle which from the list or add</i> Metaphor, Character Cards, Conversations That Matter, Stakeholder Behaviour Analysis, Other (specify):	

Move markers to indicate scale for each Tag question

Table A4.1 Examples of completed Impact Reflection Dairies

Example 1	
Headline: Understanding how we can change behaviours	
Situation: A group of students who were engaged in a mentoring program had been discussing the need to “fit in” and whether it was possible to change behaviours depending on circumstances. They completed the on line behaviour profile before the following session and completed two profiles using two different scenarios of their choosing. We looked at the profiles and discussed the differences and similarities and provided feedback to one another. We also built the mentor group from the Organizational Zoo cards to see if and how that might be different or the same.	
Impact: <i>Describe how will this make a difference</i>	
Outputs (<i>tangible items produced or destroyed</i>) Individual behaviour profiles, Group profiles, Practise in talking out loud about themselves and their attributes, Feedback from others on how they saw them	Benefits (<i>value created or destroyed</i>) A baseline to reflect on in terms of behaviours A realisation that some behaviours are “core behaviours” while others can be changed and adapted depending on circumstances
Outcomes (<i>intangible aspects produced or destroyed</i>) A more in depth understanding of themselves as individuals Learning about change of behaviour and behavioural choice.	Beneficiaries (<i>who receives the benefits</i>) The students in the group.
Reflections: <i>What do you think and feel made this experience worth recording</i> The experience is a useful “Teaching” tool. It was responded to very positively by the students who indicated they felt quite safe in looking at themselves in a metaphorical way. A similar process could be used in business coaching. Feedback from one of them indicated that they had a lot to reflect on after the session which could be considered to be a measure of impact.	
Tools used: Metaphor, Character Cards, Conversations That Matter.	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> Some of the concepts were a little difficult for one student who was an overseas student. Their understanding could be enhanced by some more introductory explanation prior to undertaking the online behavioural profile. The real power of metaphors and the cards is being able to talk in the third person. This removes the personal aspect from both sides of the fence and any emotional bogging down that occurs from this.	
Self tags: Planned (0.6), More than expected (0.7), Feeling positive (0.8), Experience – helpful to others (0.7)	

Example 2	
Headline: Team having difficulty with another team belittling them	
Situation: Team A members were changing and needed to develop capability and capacity to task on the work. Team B were engaging in attacking conversations because they thought Team A should do things more quickly and thought them incompetent because they were slower.	
Impact: <i>Describe how will this make a difference</i>	
Outputs (<i>tangible items produced or destroyed</i>) Understanding of what underlay Team B behaviour(outcome)	Benefits (<i>value created or destroyed</i>) Feeling safer due to understanding and strategy Removing the personal from the conversations by talking in the 3 rd person.
Outcomes (<i>intangible aspects produced or destroyed</i>) Strategy to deal with team B	Beneficiaries (<i>who receives the benefits</i>) Team A felt more positive and empowered.
Reflections: <i>What do you think and feel made this experience worth recording</i> It was quite impromptu and came from a casual conversation over coffee. There was a demonstration of how a potentially negative feeling gathering could be tuned into a more empowered and positive one.	
Tools used: Metaphor, Character Cards, Conversations That Matter.	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> Perhaps use some reverse brainstorming to get more creative options for strategies as there seemed to be other possibilities that were not looked at.	
Self tags: Impromptu (0.3), More than expected (0.8), Feeling positive (0.8), Experience – helpful to others (0.7)	

Example 3	
Headline: Addressing the blame game	
Situation: A small middle management team was having trouble dealing with difficult behaviours from other employees and staff. They believed that they were a really cohesive team and were skilled, but there was lots of blaming behaviours.	
Impact: <i>Describe how will this make a difference</i>	
Outputs (<i>tangible items produced or destroyed</i>) Improved communications	Benefits (<i>value created or destroyed</i>) Understanding self-behaviours and behaviours of others.
Outcomes (<i>intangible aspects produced or destroyed</i>) Changing behaviours	Beneficiaries (<i>who receives the benefits</i>) Team members and other staff.
Reflections: <i>What do you think and feel made this experience worth recording</i> The insight gained when the cards were used to design the current middle	

management team and their behaviours and then the behaviours and the team they would need to deal with the difficult behaviours was quite profound. The blaming behaviour stopped almost immediately as the awareness was that the two aspects were so profoundly different and the team themselves needed to drastically change.
Tools used: Metaphor, Character Cards, Stakeholder Behaviour Analysis.
<p>Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i></p> <p>It was a very safe way to get people to reflect on what was needed to change and moved the personal out of, and therefore aided the cessation of the blaming behaviours. Team built a behavioural profile of the way they are now and then an assessment of the way they need to be to deliver on their tasks.</p> <p>This highlighted a clear behavioural gap that they agreed had to change. Design a follow up with the team, design practise behaviours more specifically with them and get them to use reflection.</p> <p>They agreed to participate in a residential at which they defined aspects of the current behaviours that were unacceptable. They are now in the process of embedding these decisions and gathering support for how they can work together to embed the new behavioural norms.</p> <p>The powerful things was the Ah Ha moment when they realised they were not behaving in a way that would enable them to achieve their aims. The use of the cards provided a safe mechanism for them to come to this realisation.</p>
Self tags: Impromptu (0.4), More than expected (0.6), Feeling positive (0.8), Experience – helpful to others (0.7)

Example 4 Headline: University Tutorial	
Situation: Delivering tutorial exercises to masters level students. Used character cards to explore required behaviours for a knowledge team and for communities of practice. Students asked to highlight positive and negative behaviours.	
Impact: <i>Describe how will this make a difference</i>	
Outputs (<i>tangible items produced or destroyed</i>) Group discussion in class Notes from the experience	Benefits (<i>value created or destroyed</i>) The student group.
Outcomes (<i>intangible aspects produced or destroyed</i>) Understanding of how metaphor can be used in a business context. Describe appropriate behaviours for sharing. Evaluate impact of behaviour on knowledge sharing.	Beneficiaries (<i>who receives the benefits</i>) Fun Learning. Clearer understanding of concepts. And myself- becoming more familiar with use of the metaphor tools in practice.
Reflections: <i>What do you think and feel made this experience worth recording</i> By running four different iterations of the exercise (different groups) students became more familiar with the cards and more comfortable with the metaphor. Observed students operating within the metaphor through use of animal references	

in discussion. Was able to see “lights going on” for many as they realised implications.
Tools used: Character Cards, On-line profiler.
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> Helped to build rapport with the students. Running through profile on-line helped.
Self tags: Fully pre-planned (1.0), As expected (0.5), Feeling positive (0.9), Experience – helpful to others (0.8)

Example 5

Headline: Organisational values review

Situation: Organisation X was part of a larger organisation. Currently 2 sets of values existed, one for the larger organisation and one part formed set for the smaller part of the organisation. There was disagreement about what was relevant and some inappropriate behaviours being shown by some members of the organisation. A workshop was designed using narrative and Organisational Zoo metaphor in order to understand positive contributing behaviours and behaviours that detracted from the values. It was also hoped that there might be some emergence of values to which the group would agree. The entire organisation was involved a total of about 70 people and was a day long workshop.

Impact: *Describe how will this make a difference*

<p>Outputs (<i>tangible items produced or destroyed</i>)</p> <p>Emergence of a set of values through story and metaphor. An organisation specific “Organisational Zoo” to demonstrate in metaphor the appropriate & accepted behaviours for the organisation.</p>	<p>Benefits (<i>value created or destroyed</i>)</p> <p>Open, honest and rigorous discussion and conversation. A mutual understanding of behaviours that the organisation would accept. Clear collaboration on a number of organisational aspects. Ownership by the people in the organisation of their set of values and therefore greater acceptance of them. A developed understanding of the behaviours underpinning the values that serve to “bring the values to life”.</p>
<p>Outcomes (<i>intangible aspects produced or destroyed</i>)</p> <p>An understanding of how the organisation might look in the future and how it could be the best it could be.</p> <p>A revelation by the group that differences in behaviour need to be tolerated unless they were absolutely destructive behaviours.</p> <p>Personal insights into their own behaviours and attitudes.</p>	<p>Beneficiaries (<i>who receives the benefits</i>)</p> <p>People within the organisation. Clients and customers of the organisation.</p>

<p>Reflections: <i>What do you think and feel made this experience worth recording</i></p> <p>The energy and commitment that the techniques developed was amazing. I had also expected some difficulties with people, but using metaphor diffused the personal and took a lot of the emotion out of the situation so it made it both safer and easier for people to discuss and debate ideas.</p> <p>The technique worked very positively with a large group. The group also embraced metaphor and seemed to gain enormously from its use. In designing their organisation they went beyond the animal cards to wanting include the box in which the cards came as this was like the organisation and a bit battered around the front door (lid of the box) and the card instruction sheet as this represented the legislative requirements on which their work was based.</p> <p>They also chose to draw the animals when looking at positive and negative behavioural contributions and then used this as a basis for conversation. The use of narrative with metaphor also worked well for people as it gave them multiple contexts and helped move away from the personal into the safe zone. And somehow the act of story-telling puts people into the same space as the use of metaphor. The two are linked in concept and approach and use similar personal capabilities.</p>
<p>Tools used: Metaphor, Character Cards, Conversations That Matter.</p>
<p>Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i></p> <p>Explaining the structure of the conversations was quite difficult and I think I might have confused people. It would have been better to explain simply and listen intently to what was being said with some gentle prompts.</p> <p>Participants were keen to design their own “Organizational Zoo” after the positive and negative behaviours exercise. They debated and discussed the characters that were to be included as a group. It was interesting to note that there was an emergence of accepted and desired behaviours, accepted but less desirable behaviours and a set of behaviours that would not be tolerated. The issue that emerged from this was that there are some behaviours that people do not like being displayed and find less acceptable, but they need to tolerate and manage differences. These less acceptable behaviours are ok as long as they not destructive. They were demonstrated by the inclusion of animal characters in the Organizational Zoo that were seen by some small groups as having a negative impact on the particular story they chose.</p>
<p>Self tags: Planned (0.7), More than expected (0.8), Feeling positive (0.8), Experience – helpful to others (0.7)</p>

<p>Example 6</p>
<p>Headline: Group conflict resolution</p>
<p>Situation: A team was having difficulties engaging with each other, resulting in tension and poor performance. The project manager was asked to intervene to reduce the conflict and bring the team back on track. The PM first asked each team member to write down the desired outcomes of each member (which were quite similar) and then asked them to characterise the current team behaviours using the character cards. Once that was done, they were then asked to characterise how the team needed to behave in order to achieve their desired outcomes. What followed was a frank, but constructive conversation about the gap between the current and desired behaviours. Afterwards the team worked better together and the project was</p>

delivered on time and with less conflict than occurred previously.	
Impact: <i>Describe how will this make a difference</i>	
Outputs (<i>tangible items produced or destroyed</i>) A common list of desired outcomes (not previously listed). Collaboratively generated profile of unacceptable behaviour. Collaboratively generated profile of required behaviour.	Benefits (<i>value created or destroyed</i>) More effective work processes post the intervention. More productive team focused around the needs of the project, rather than personal opinions and territorial actions. Project delivered on time and to desired quality.
Outcomes (<i>intangible aspects produced or destroyed</i>) Understanding of the difference between current and desired state and what needed to change to correct the imbalance. Greater awareness of the diversity of desired outcomes and what was driving them. A greater respect between members of the team.	Beneficiaries (<i>who receives the benefits</i>) The team members. Project stakeholders. Project organisation Client organisation.
Reflections: <i>What do you think and feel made this experience worth recording</i> Under stressful conditions people can be more sensitive and small things can irritate them more than usual. The conversation using the metaphor cards and the reflective approach (asking what was most important) enabled the project manager to refocus the group in a safe way. They could talk about the behaviours rather than the person. This depoliticised the situation and there seemed to be a general acceptance that the arguments were not as important as the bigger goal.	
Tools used: Metaphor, Character Cards, Conversations That Matter.	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> Knowing when and how to defuse behavioural situations can be difficult. It was possible that this intervention would not work if it was not for the strength of the project manager and the respect that team members had for him. There was a point where the situation could have failed and was saved by the PM “reading” the most negative person well and addressed their concerns in a direct but positive manner. Use of any tools can be dangerous!	
Self tags: Planned (0.6), More than expected (0.7), Feeling positive (0.85), Experience – helpful to others (0.9)	

Example 7

Headline: Engineering meeting to resolve issue

Situation: Property has water plateau issue affecting the infrastructure of the building. Meeting with committee of representatives including project manager and engineers to resolve. Prior to meeting assessed the expected behaviours of the parties to plan engagement.

Impact: <i>Describe how will this make a difference</i>	
Outputs (<i>tangible items produced or destroyed</i>) Behavioural profile of parties Planned approach for the meeting	Benefits (<i>value created or destroyed</i>) Less stress and more predictable meeting interactions.
Outcomes (<i>intangible aspects produced or destroyed</i>) Understanding of how the various players would interact in the meeting so knowing how to interact. Effective “forecasting” of the players influencing decision making.	Beneficiaries (<i>who receives the benefits</i>) Myself- getting better meeting outcomes and becoming more familiar with use of the metaphor tools in practice.
Reflections: <i>What do you think and feel made this experience worth recording</i> Demonstrated the value of deploying different policies and interactions	
Tools used: Character Cards, On-line profiler, Conversations that Matter.	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> Predicted behaviours “Surprisingly close” to actual behaviours displayed.	
Self tags: Fully pre-planned (1.0), As expected (1.0), Feeling positive (1.0), Experience – helpful to me (0.5)	

Example 8	
Headline: Engaging client	
Situation: Client was having difficulty understanding their political environment and why they were having trouble influencing their team.	
Impact: <i>Describe how will this make a difference</i>	
Outputs (<i>tangible items produced or destroyed</i>) Cards used to assess current behaviours	Benefits (<i>value created or destroyed</i>) Client had greater awareness of where influences were coming from and the behaviours driving them.
Outcomes (<i>intangible aspects produced or destroyed</i>) Client changed their tactics with senior stakeholders and slowly gained more influence	Beneficiaries (<i>who receives the benefits</i>) Client more effective. Helped build my reputation with client
Reflections: <i>What do you think and feel made this experience worth recording</i> Enjoyed how the tool was used in an on-the-spt situation and worked well to define a solution.	
Tools used: Character Cards, On-line profiler.	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> Keep cards handy- you never know when you might need them	
Self tags: Fully pre-planned (0.2), As expected (0.7), Feeling positive (0.9),	

Experience – helpful to me (0.9)

Example 9

Headline: Intimidation of new staff

Situation: It was difficult to assimilate as a new staff member into the work environment and adhere to the routines that were set up by an longer serving staff member. First time I had experienced such a negative personality that was ingrained into the way to do and not do things. The control achieved a smooth sailing task management, but did not allow for any individual approach, resulting in a constantly challenged workforce and negative attitude. The resultant outcome was dishonest environment.

Impact: *Describe how will this make a difference*

Outputs (*tangible items produced or destroyed*)

Metaphor profile helped to understand the nature of the person

Benefits (*value created or destroyed*)

Understand that the behaviour was not personal attaché on me specifically- generic poor relationship with everyone.

Outcomes (*intangible aspects produced or destroyed*)

Led me to understand the behaviour, but not to be able to accept it.

Beneficiaries (*who receives the benefits*)

Myself- whilst the situation was very negative, I was able to break it down to see this was the “nature of the beast”.

Reflections: *What do you think and feel made this experience worth recording*
Glad I did not stay in the toxic environment- so much relief to leave.

Tools used: Character Cards, On-line profiler.

Learning Points: *Describe what you would do differently if you were in a similar situation again*

Never get entrenched in your ways.

Self tags: Fully pre-planned (0.1), As expected (0.8), Feeling positive (0.5), Experience – helpful to me (0.5)

Example 10

Headline: Responding to a forced change of role

Situation: The organisation’s board selected a new CEO who was very different from the previous- much more command and control Lion/Rattlesnake compared to the previous experimental and collaborative Eagle/Owl. This resulted in a restructure which divided the team and change the emphasis (and culture) of the organisation.

Impact: *Describe how will this make a difference*

Outputs (*tangible items produced or destroyed*)

Profiling the new CEO and my new boss
Plans for my follow up meeting with my new manager

Benefits (*value created or destroyed*)

Much greater confidence to direct the meeting.
Secured a redundancy rather than

	being forced into an undesired role
Outcomes (<i>intangible aspects produced or destroyed</i>) Much happier to leave the organisation on my terms having made a stand about what I was, and was not, prepared to do. Huge confidence booster to stand up to a lion and get what I wanted.	Beneficiaries (<i>who receives the benefits</i>) Me. I would have been very unhappy in the new culture, especially as the previous management were almost opposite culture.
Reflections: <i>What do you think and feel made this experience worth recording</i> Profiling the stakeholder (new boss) and finding a way to approach them with confidence was a revelation. I was very proud of what I had done, and this was outside my normal behaviours- but the situation required it to happen.	
Tools used: Character Cards, Conversations that Matter.	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> I found it very useful to discuss with an external mentor before approaching the situation. Reflecting with him helped to build my confidence and reassure me it was the best way forward.	
Self tags: Fully pre-planned (1.0), As expected (0.9), Feeling positive (1.0), Experience – helpful to me (0.5)	

Example 11 Headline: Techno-phobic team	
Situation: Had to provide training on a time-critical system involving technology wary team members. I used the Triceratops and Vulture characters to open conversations about change resistance and what drives that.	
Impact: <i>Describe how will this make a difference</i>	
Outputs (<i>tangible items produced or destroyed</i>) Created a profile of the stakeholders and addressed their change resistance by confronting the resistance.	Benefits (<i>value created or destroyed</i>) Approach got more traction and training better received
Outcomes (<i>intangible aspects produced or destroyed</i>) Created a safe environment to talk about negativity and address issues.	Beneficiaries (<i>who receives the benefits</i>) Trainees and myself.
Reflections: <i>What do you think and feel made this experience worth recording</i> Lessening threat of the technology helped. Difficult to have conversations remotely.	
Tools used: Character Cards, Conversations that Matter.	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> Next time focus more on the Triceratops behaviour than on Vulture. Vulture was a little sensitive and Triceratops less confrontational (remotely).	
Self tags: Fully pre-planned (0.4), As expected (0.5), Feeling positive (1.0),	

Experience – helpful to me and others (1.0)

Example 12

Headline: Ask for forgiveness, not permission

Situation: Created several wikis and opened access to the portal without seeking permission. I planned how they might react before breaking the news to the business owner (typically change averse Triceratops) in a meeting. By changing my behavioural style from Whale to Owl, I was able to influence them more and get approval to keep the systems open.

Impact: *Describe how will this make a difference*

Outputs (*tangible items produced or destroyed*)

Profiling the stakeholder in advance and planning how to approach them
Got support for the decision

Benefits (*value created or destroyed*)

Created a collaborative virtual environment now being used by several people

Outcomes (*intangible aspects produced or destroyed*)

Pleased to open up potential innovation environment and opportunities to expose the business to new technologies

Beneficiaries (*who receives the benefits*)

The people who are now using the wiki to interact in ways they could not do so before.
Me- learnt how to adjust my behaviour to get better outcomes.

Reflections: *What do you think and feel made this experience worth recording*
Techniques worked well and ensured the stakeholder was not left in a state of resentment. They said: “I am not happy with the way you did that, but good on you”.

Tools used: Character Cards, Stakeholder assessment.

Learning Points: *Describe what you would do differently if you were in a similar situation again*

It is risky, but sometimes you just have to go with what is right.

Self tags: Fully pre-planned (0.75), As expected (1.0), Feeling positive (1.0), Experience – helpful to me and others (1.0)

Example 13

Headline: Meeting the Director

Situation: Planning for the first time meeting with our new director. I wanted to engage him well on a verbal briefing and provide an understanding of what I could do and why. Applied the cards to assess behavioural preferences from what I knew of him.

Impact: *Describe how will this make a difference*

Outputs (*tangible items produced or destroyed*)

Awareness of the new directors style
Knowledge of new directions

Benefits (*value created or destroyed*)

Clarity and understanding

Outcomes (*intangible aspects produced or*

Beneficiaries (*who receives the*

<i>destroyed)</i> Rapport Support Knowledge	<i>benefits)</i> Team through greater support for new sponsor.
Reflections: <i>What do you think and feel made this experience worth recording</i> Thinking about the meeting and the character of the new director in advance was helpful. Metaphor helped with insights	
Tools used: Character Cards, Stakeholder assessment.	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> Spend time researching who I meet, background and style	
Self tags: Fully pre-planned (1.0), As expected (1.0), Feeling positive (1.0), Experience – helpful to me (0.5)	

Example 14	
Headline: Testing legal cases	
Situation: Planning for a meeting of program directors and project teams on issues to discuss approach going forward.	
Impact: <i>Describe how will this make a difference</i>	
Outputs (<i>tangible items produced or destroyed</i>) Secured desired decisions Decision process	Benefits (<i>value created or destroyed</i>) Progression of work in desired direction. Enhanced performance.
Outcomes (<i>intangible aspects produced or destroyed</i>) Strategic alignment across parties	Beneficiaries (<i>who receives the benefits</i>) The wider team and the branch.
Reflections: <i>What do you think and feel made this experience worth recording</i> Successful gathering of information and collaboration. Good exchange of ideas and understanding of strategy	
Tools used: Conversations that Matter, Stakeholder Behaviour analysis.	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> Works well- encourages more opinions and information exchange.	
Self tags: Fully pre-planned (1.0), As expected (0.5), Feeling positive (1.0), Experience – helpful to me and others (1.0)	

Example 15	
Headline: Appointment of service provider	
Situation: Wanted to approve a creative educational video to educate clients. Was concerned that the risk averse decision-makers would not approve it. Assessed what aspects of the program they could be adversely affected by and addressed them head on in the presentation.	
Impact: <i>Describe how will this make a difference</i>	
Outputs (<i>tangible items produced or</i>	Benefits (<i>value created or</i>

<i>destroyed)</i> Service provider and project approved	<i>destroyed)</i> High quality education video production with no resistance.
Outcomes (<i>intangible aspects produced or destroyed</i>) Clients get the education they need to enhance their services. Knowing what people's driver are and what they are concerned about helps to influence them better.	Beneficiaries (<i>who receives the benefits</i>) Clients (and therefore the wider community) and the service provider and internal team.
Reflections: <i>What do you think and feel made this experience worth recording</i> Obtaining influence over the senior managers is critical to smooth operations. Planning was important to reflect on possible concerns and how to relieve them of these concerns based on their behavioural characteristics	
Tools used: Character Cards, Stakeholder assessment, Conversations that Matter.	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> Knowing what their drivers are will get you what you want.	
Self tags: Fully pre-planned (1.0), As expected (0.5), Feeling positive (1.0), Experience – helpful to me and others (1.0)	

Example 16	
Headline: Deciding to move on	
Situation: I have been in the organisation a long time and needed to consider a change. I profiled the Zoo and myself to determine if I was the right fit or not.	
Impact: <i>Describe how will this make a difference</i>	
Outputs (<i>tangible items produced or destroyed</i>) Redefining on who I am and what I want Personal challenge	Benefits (<i>value created or destroyed</i>) Somewhat objective self-analysis
Outcomes (<i>intangible aspects produced or destroyed</i>) Learnt more about myself and my need to move on. Happier once decision made	Beneficiaries (<i>who receives the benefits</i>) Me – and those I work with.
Reflections: <i>What do you think and feel made this experience worth recording</i> I learnt a lot by using the zoo characters to assess what I wanted and what I behave the way I do. I decided to choose how to be and in what environment to work, rather than react to the environment	
Tools used: Character Cards, Stakeholder assessment.	
Learning Points: <i>Describe what you would do differently if you were in a similar situation again</i> Big decisions can be helped with good reflection and tools.	
Self tags: Fully pre-planned (0.5), As expected (0.7), Feeling positive (0.8), Experience – helpful to me (0.5)	

Table A4.2 Blank survey forms (post intervention one)

This part of the research is designed to consolidate your thoughts on the impacts of the research interactions. In action research the perspective of the research subjects is far more important than the perspective of the researcher. The more specific your information can be (without disclosing any names) the better the validity of the findings (because it has supporting evidence, rather than being solely opinion based). Please be honest about what you think and as specific as you can about both positive and negative perceptions. **Thanks!**

Your participant code (from bottom of your Impact diary):

1. Do you believe the metaphor techniques impacted on your team interactions?

1 Of minimal use 2 Interesting 3 Potentially useful 4 Directly applicable 5 Outstanding/changed my perspective

Please describe why you gave this rating? (i.e. is there any evidence to support your statement)

More space allocated in original form

2. Did you apply any of the techniques in your work and if so, did it work well?

Ideally support with an impact diary statement

If you have not yet applied but intend to please describe what you intend to do

If you do not intend to apply any techniques, please describe why.

More space allocated in original form

3. What impact did the research interventions have on your views on how projects should be approached? Ideally support with an impact diary statement.

More space allocated in original form

4. Have your attitudes towards the use of metaphor techniques in project management changed? If so how? Refer to impact diary statements as appropriate.

More space allocated in original form

5. What are your reflections of the impact of the reflective practice, conversation, and metaphor model on your own thinking and behaviour?

Refer to impact diary statements as appropriate.

More space allocated in original form

6. Which techniques did you use and comment on how effective they were?

(Refer to impact diary statements as appropriate)

Reflective practice cycle (R-P-D-O)	
Conversations that Matter (O-O-B-B)	
Zoo metaphor for planning/conversing	
Stakeholder assessment	
Character cards	
Invisible maze	

General comments you think may be relevant to this research:

More space allocated in original form

Key research questions:

- A. How is the stakeholder engagement process enhanced through the use of metaphor tools?**

More space allocated in original form

- B. How can project team members influence outcomes more effectively by better targeting stakeholder behaviours?**

More space allocated in original form

- C. How does the team operate more effectively by using metaphor to help align roles or tasks to team member.**

More space allocated in original form

Thanks you for your participation in this research. I look forward to sharing the outcomes with you.

Arthur Shelley

This part of the research is designed to validate the research summary and gather evidence to support or reject the proposition and research questions.
Please record any comments you have during the focus group in the appropriate heading. This data will be used to challenge or supplement the findings.

The more specific your information can be (without disclosing any names) the better the validity of the findings (because it has supporting evidence, rather than being solely opinion based). Please be honest about what you think and as specific as you can about both positive and negative perceptions. **Thanks!**

Please enter your participant code (from bottom of your Impact diary): **Person #**

Q1. Are you surprised at the outputs of the baseline summary of your team?
Discuss to verify why this was unexpected.
Highlight how this may impact how you interact with others in future.

More space allocated in original form

Q2. How do our behaviours benefit us and create limitations for us, as a group?
Did the metaphor characters assist this understanding? If so, how?

More space allocated in original form

Q3. Can metaphor characters assist me to develop better relationships given my individual behavioural preferences?
If so, how might they do that?

More space allocated in original form

Q4. Do you believe the metaphor cards help to provide insights into the most effective way to interact with stakeholders?
If so how? Ideally supported later with an impact diary statement.

More space allocated in original form

Q5. Do you believe that the model combining reflective practice, conversation, and metaphor will be useful for your own thinking and behaviour?

Refer to impact diary statements as appropriate.

More space allocated in original form

Q6. Please comment on any of the techniques used in this research that made an impression on you and which you may use in future.

Conversations that Matter (O-O-B-B)	
Zoo metaphor for planning/conversing	
Stakeholder assessment	
Character cards	
Invisible maze (Puzzle matrix used in workshop 1)	

Q7. Please respond to the key research questions:

A. How is the stakeholder engagement process enhanced through the use of metaphor tools?

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B. How can project team members influence outcomes more effectively by better targeting stakeholder behaviours?

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C. How does a team operate more effectively by using metaphor to help align roles or tasks to team member.

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Q8. Comment on how confident you are that continued use of these techniques will enhance you performance and improve team outcomes for you?

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Thank you for your participation in this research. I look forward to sharing the outcomes with you.

Arthur Shelley

Any other comments you have about your experiences in the research are welcome here: