Using Metaphor to Understand and Communicate

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OLSON ZALTMAN ASSOCIATES
Olson Zaltman Associates

• Cutting edge research and consulting firm

• Dedicated to understanding people at deep, emotionally rich levels

• Prof. Gerald Zaltman of the Harvard Business School

• Prof. Jerry Olson of Penn State University
Overview

• A Few Facts about the Mind

• Introduction to the Zaltman Metaphor Elicitation Technique

• Two Examples
Humans make decisions implicitly

We take in 11 million bits of information per second…

…Consciousness can only process 10 – 60 bits per second

Mental models filter information and create meaning

Prostitutes Appeal to Pope
Metaphor is a mental process of understanding

The mind always proceeds from the known to the unknown

Applying existing knowledge to make sense of something new

“it’s like Coke only…” Mistaking a stick for a snake

On a deep level: metaphors shape how we see our world

- I exploded
- he’s about to boil over
- Don’t get hot
Three types of metaphors

Surface Metaphors
- *Everyday speech*
- *Idiosyncratic*

Thematic Metaphors
- “*Frames*”
  - Shared by groups from segments to cultures

Deep Metaphors
- *Human Universal Concepts*
  - Shared by all
  - Unconscious, automatic
  - 10 – 20 total
Leveraging the latest understanding of the mind

- **Zaltman Metaphor Elicitation Technique (ZMET)**
  - Interview and interpretation process designed to “dig deep” into people’s minds.
    - U.S. Patent # 5,436,830
  - 400+ ZMET studies and 8,000+ ZMET interviews in 30 countries.

- Two quantitative techniques: Response Latency Testing and Memory Integration Testing
The Zaltman Metaphor Elicitation Technique

- **One-on-one** interviews lasting 2 hours

- Please **choose 6-8 pictures** that represent your thoughts and feelings about...
  
  1. diabetes and its treatment
  2. donating to Major University
  3. trust, and its role in your life

- **Non-directive**

- **7 steps** to leverage different ways of processing information

- **Multi-stage analysis**: what people say and how they say it
ZMET Example:
How do donors differ from each other?

Interview Step: Storytelling

“[University] is in many ways our church. ... We have deep personal beliefs about it. It does stir in us very deep loyalties and faith.”

“How does faith relate to [University]?”

“Faith in the sense that you can really hurl yourself into without limit. It’s truly good and worthy of your efforts, sacrifice, belief, and commitment.”

“Why is that important?”...etc.
ZMET Example:
How do donors differ from each other?

Interview Step: Digital Image
Donor Type 1 – Sample Collage
Donor Type 1 – Sample Collage
Donor Type 2 – Sample Collage
Donor Type 2 – Sample Collage
Analysis: What people say & how they say it

Donor Type 1

Donor Type 2
“Camaraderie, a sense of belonging to a group.”

“We each have an opportunity and a responsibility to make life better.”

“It’s the Catholic Church – ‘For so long we’ve laid the dogma, and we’ve been the ruler, you’ve been protected against all evil.’”

University is like a Church

**Churches CONNECT**

**Churches TRANSFORM**

**Churches CONTROL**
Both groups think of Harvard as a “church”

Donor Type 1: Clerical Church

• “Clergy”: special bond
• Mystical, eternal
• Strong authority

Donor Type 2: Lay Church

• “Congregation”: Communal bond
• Diaspora
• Giving back
Example: Healthcare Policy

- Study of two audiences of interest to a major non-partisan organization
- Focus: one piece of healthcare policy
Group A
JOURNEY

“there are two paths…one is a disadvantage…or where they don’t have a care.”

“get a jumpstart in life”

“giving them a roadmap”

Group B
CONTAINER

“They’d have their noses pressed to the window”

“people are locked up in a bad guy managed care plan”

“We built them into a system”
Ramifications of thinking in Journey and Container

- Macro-view / large social categories
- Individuals are trapped in situations
- Static system → Frustration

- Micro-view / individual focused
- Individuals can choose different paths
- Change over time → Hope
What do each want from healthcare policy?

- Breaking down barriers
- Want a quick break and change
- Emphasis on fixing social forces
- Guides and maps
- Tolerant of slow change / delayed benefit
- Emphasis on changing individual behavior
Metaphor fosters co-creation

Co-creation: Blending existing knowledge with an external stimulus to develop a unique meaning

*policy x will increase access*  *policy x will break down the walls to care*