

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

THE HEINZ ENDOWMENTS

*Coca-Cola*

CONDÉ NAST  
PUBLICATIONS



DU PONT



AstraZeneca  
International

*Pfizer*

arnoldworldwide



*Procter & Gamble*

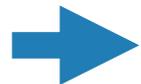
# Overview

- 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

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**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

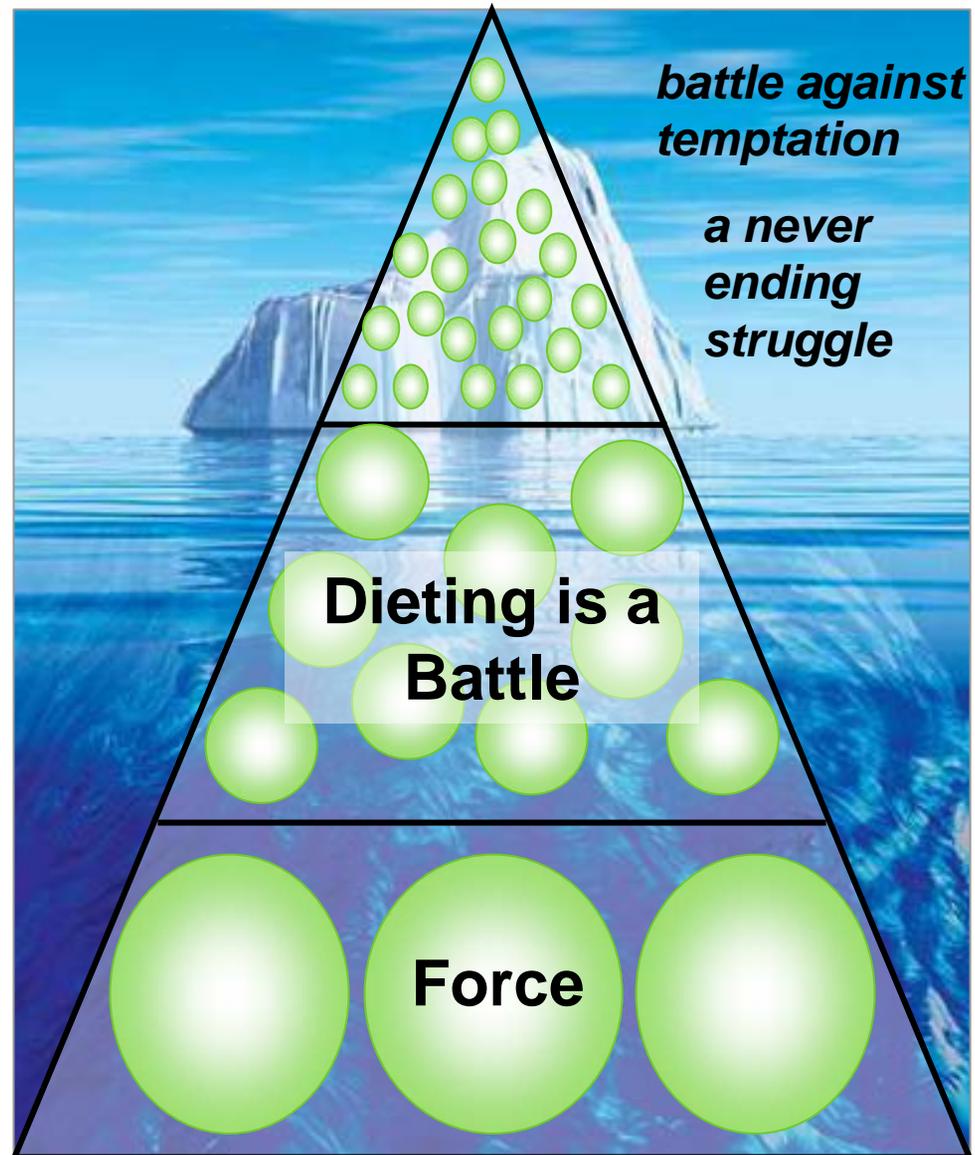
- *Everyday speech*
- *Idiosyncratic*

## 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...

*...diabetes and its treatment*

*...donating to Major University*

*...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

## 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.*



# How do donors differ from each other?



Interview Step: Digital Image

# Donor Type 1 – Sample Collage



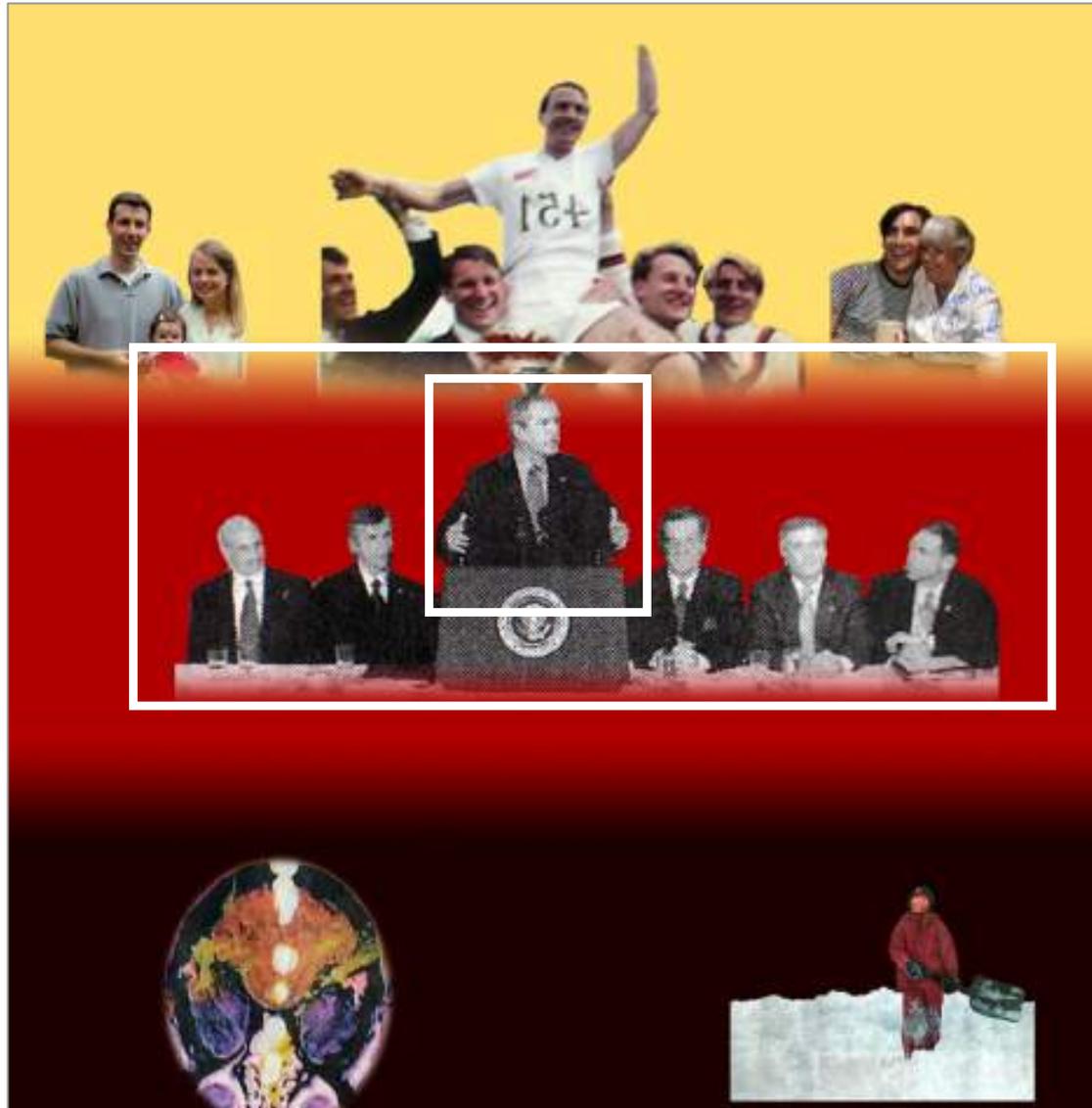
# Donor Type 1 – Sample Collage



# Donor Type 2 – Sample Collage



# Donor Type 2 – Sample Collage



# Analysis: What people say & how they say it

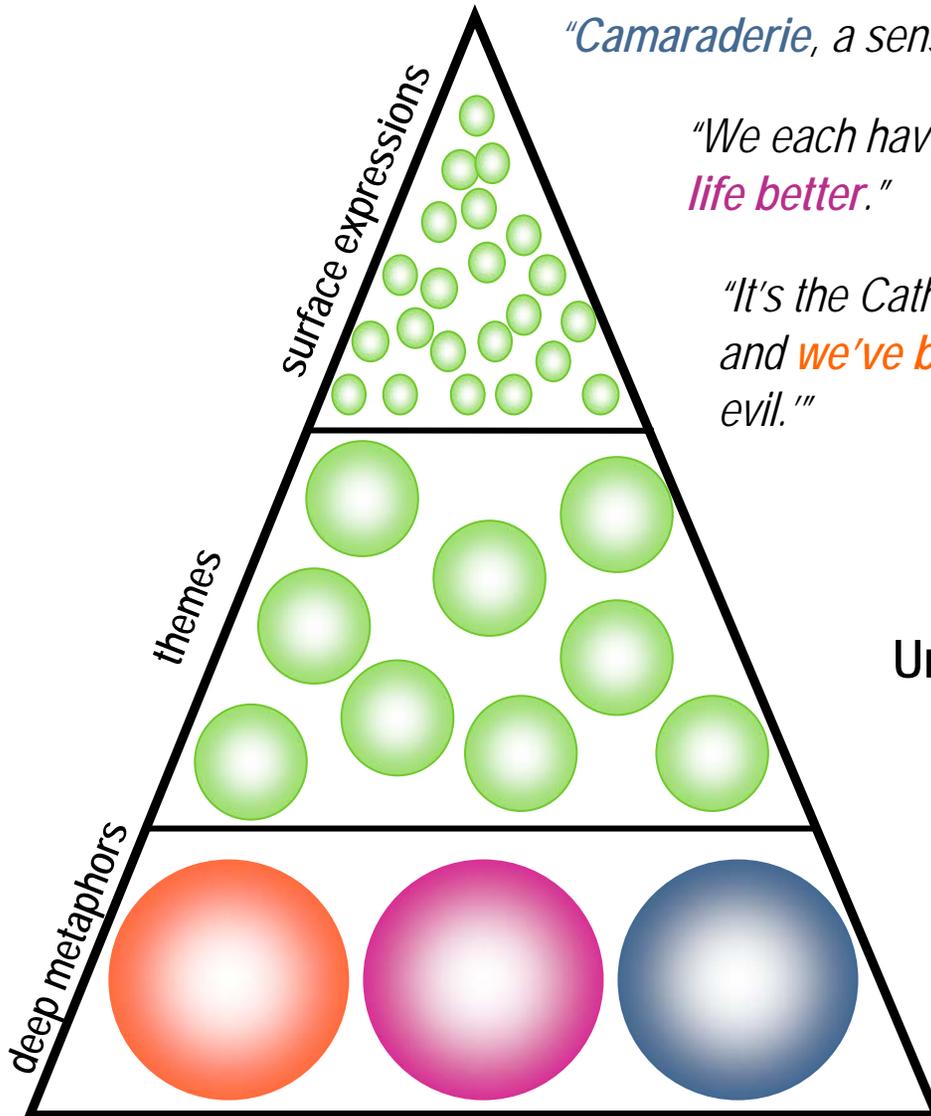
## Donor Type 1



## Donor Type 2



# Three Deep Metaphors frame the University



*"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*



