

Innovation in Teaching Strategy: Using of Sports As Cognitive Metaphor

Rozhan Othman

Malaysia-Japan International Institute of Technology,

Universiti Teknologi Malaysia

Address: Skudai, 81310 Johor, Malaysia

E-mail: rozhan@ic.utm.my

Khor Minee

Faculty of Arts, Communication and Education (FACE),

Infrastructure University Kuala Lumpur (IUKL),

E-mail: khorminee@iukl.edu.my

Abstract: Teaching strategy is particularly challenging because it involves developing the ability to think strategically. At the heart of strategic thinking is creativity. Yet, many textbooks on strategy present it as a procedural process involving a number of steps. This paper proposes that instructors can rely on using cognitive metaphors to help stimulate thinking and questioning about strategizing. Specifically, we propose that sports can be used as cognitive metaphors to help students think deeper about competitive issues faced by businesses. We propose some guidelines on the metaphorical use of sports in teaching strategy

Cognitive metaphor, strategy, creativity

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INTRODUCTION

Teaching strategy can be challenging. At the heart of teaching strategy is developing students' strategic thinking skills. Yet, the available teaching material on the subject do not usually help develop such a skill. Some are too procedural in that strategy is presented as a sequence of steps to be followed. As a result, there is the risk that strategizing may end up being understood more as a bureaucratic process. Strategy becomes more like "strategic programming" (Mintzberg, 1994).

Early thinking in the field of strategy was largely influenced by the "planning model" which depicts strategizing as a formal, highly ordered, mechanistic and linear process (Mintzberg, 1978). This implies that the process of formulating a strategy is rational and logical process with the implementation proceeding in an orderly manner, akin to steering a airplane. This outlook continues to prevail in some discussions about strategy. Bessire and Baker (2004) point out that this understanding of strategy can be seen in the discussions on the Balanced Scorecard. Indeed, anecdotal evidence suggests that some organizations continue to operate in this manner with an elaborate strategy formulation process that results in a thick strategy documents that spells out in considerable detail the key performance indicators and detailed action plans.

The way strategy is presented and taught in many textbooks perpetuates this outlook. Many books still depict strategizing as consisting of discrete steps to be implemented with the use of a plethora of analytical tools. To a certain extent, the presentation of strategy formulation and implementation in this manner do help to make the process easier to understand. It helps authors and instructors explain the main component in strategy formulation and implementation. However, in doing so, it risks oversimplifying the dynamic and fast changing reality that organizations face. Companies competing in a high velocity environment have to deal with a high degree of uncertainty and constant change. New challenges and opportunities emerge at a fast rate and it is not possible to develop elaborate plans with a high degree of certainty. Instead of detailed analysis and elaborate actions plans, these companies have to create success by seizing "fleeting opportunities" (Eisenhardt and Sull, 2001). Mumford et al. (2007) argue that in such a situation, strategizing should focus more on creating a sound base plan instead of a detailed plan. This helps build in flexibility while maintaining constancy of purpose. Eisenhardt and Sull (2001) propose that organizations competing in high velocity environments should rely on a more flexible approach to strategic planning. Instead of developing detailed routine to execute their strategy, these organizations should rely on a set of simple rules that serve as the premise that defines their decisions and actions.

To be fair, more books are paying attention to the dynamic and sometime fluid nature of strategizing. We propose here that the use of metaphors can be one way of explaining the nature of strategy and how it is formulated and implemented. Metaphors can be used to describe the different conceptualizations and descriptions of strategy. We offer the use of metaphor as a way to instill more creativity and use of imagination in the way strategy is described, communicated and taught. The use of metaphors will complement and enrich other approaches in teaching strategy.

DEFINITION OF METAPHOR

Metaphors are mental constructions of our imagination (Von Ghyczy, 2003). A metaphor joins two terms normally regarded as belonging to different classes of experiences (Foss, 2009). These two terms or the two parts of metaphor are called the tenor and vehicle. The tenor is the topic or subjects that being explained. The vehicle is the mechanism or lens through which the topic is viewed.

Metaphor is seen as a major means for constituting reality. We do not perceive reality and then interpret or give it meaning. Rather, we experience reality through the language by which we describe it; description is the reality we experience (Foss, 2007). Metaphors contain implicit assumptions, points of view, and evaluations. They serve as vehicles that help us organize attitudes towards the tenor they describe and provide motives for acting in certain ways. The choice of different metaphor to describe a tenor, enables us to view and experience the subject differently. The metaphors we select help us filter and organize our perception and experiences. They are important because the choice of a metaphor means choosing its rules, along with the roles and scripts that are embodied in those rules (Elgin, 1997).

Metaphor is not just a matter of language and using metaphor cannot just be approached from a linguistic perspective. Using metaphor also demands a social approach (Steen, 2011). A metaphor helps the speaker move his audience, to make his argument memorable, and to enhance his prestige in the eyes of his listeners. The use of metaphor enhances the credibility of a speaker, for this reason we might expect the usage could increase audience respect for the speaker (Bowers & Osborn, 1966). The use of metaphors can also help capture change. Anzaldua (1983) is a proponent of the use of metaphors to evoke individual and social change. She argues that shifting metaphor means changing perspectives and that metaphors help make new connections and seeing issues in new ways, for both the creator of and the audience for the metaphor.

Von Ghyczy (2003) proposes that metaphors can be categorized into rhetorical metaphors and cognitive metaphors. He defines rhetorical metaphors as metaphors that are used to compress an idea for ease of communication and aids in making an idea, event or concept more apparent. A rhetorical metaphor describes a phenomenon but does little else. An example would be describing speculative price increase as a “bubble”. It indicates that price may soon collapse, akin to the bubble coming to the point where it is about to burst. However, such a metaphor does little to describe what causes the “bubble” effect. Cognitive metaphors on the other hand, conveys information quickly and can serve to stimulate learning and discovery. It is efficient in communicating a meaning but it also contains a certain ambiguity and stimulates curiosity and more information search. Von Ghyczy (2003) argue that whereas rhetorical metaphors are familiar symbols or events that are used to explain something less familiar to the audience, cognitive metaphors is used to stimulate the audience to think creatively about something they think they already understand. The purpose is to get the audience to use the metaphor to explore alternative interpretations of a phenomenon.

Metaphors are by nature imprecise and depicts certain aspects that the communicator is trying to highlight (Tsoukas, 1993). Deeper understanding of the phenomenon of interest can be achieved by seeking a deeper understanding of the metaphor. Tsoukas (1993) argues that the communicator should use multiple metaphors as vehicles to generate a rich understanding of a tenor. The use of multiple cognitive metaphors help to liberate insight and generate alternative conceptions.

STRATEGY AND METAPHOR

The use of metaphor in the business discipline is fairly common. For instance, warfare metaphors are often used as vehicles to describe competition in business (Von Ghyczy, 2003). Kaplan and Norton (1996: 29) use the metaphor of “piloting” to describe the role of key performance indicators in steering an organization towards its objectives. Burns and Stalker describe organizations using the mechanistic-organic metaphor to describe flexibility and rigidity (Lussier, 2012: 43). These metaphors help depict and explain certain aspects of business strategy.

However, many of these metaphors are rhetorical metaphors that are used to provide a simple and concise description of various aspects of business strategy. While these metaphors serve their purpose, they are what is considered by linguists as “dead metaphors” (Von Ghyczy, 2003). They describe a phenomenon but do not stimulate further thinking and deliberation.

As Mintzberg (1994) points out, strategizing is first and foremost about creativity. It involves the use of intuition and the synthesis of ideas. Creative people rely on exploration of alternative ideas when encountering ambiguity (Mumford et al. 2003). They are able to engage in critical thinking and divergent thinking (Mumford et al. 2007). Hunter et al. (2012) propose that creative thinking also requires analogical ability and associationalability. Analogical ability is about the ability to use similarities between earlier encountered problems and new problems and utilize the ideas and solutions used in the former for the dealing with the latter. Associational ability is basically the ability to connect ideas that would otherwise remain separated in generating something new. These abilities are crucial in enabling strategist to overcome the tendency to succumb to vertical thinking, help them create short cuts in problem solving and enable them to synthesize new products and approaches to exploit opportunities.

It is in this regard that we argue that developing strategic thinking skills would be aided with the use of cognitive metaphors. The key to teaching strategy and developing strategic thinking skills is developing the willingness to consider alternative ideas and interpretations, explore beyond the obvious, examine an issue from the different angles and see connection between ideas and possibilities. We propose that the use of sports as a cognitive metaphors in teaching strategy has the ability to help stimulate the students’ imagination and thinking about strategy.

SPORTS METAPHOR AND STRATEGIC THINKING SKILL

Sport metaphors are useful for teaching a difficult concept by paralleling that concept with something the reader is familiar with and excited about. Sports metaphor should be able to help to clarify some of the basic concepts relatedto strategic planning (Wilsey, 2011).Team sports can be used as a metaphor for corporate organizations.The owner of the team, like shareholders in a corporation, do not play the game. Instead, players act on behalf of the owners, much like employees working as agents of shareholder. Inthis agency relationship, it is critical that all the employees in the organization understand and align their actions with the organization’s mission, vision and strategy. The players, like employees in a corporation, must be able to make their own decision and take action on behalf of the owners. Like business, sports are competitive activities. Success depends on the ability to organize and coordinate activities as well as understand one’s abilities, the environment and opponents’ behaviours.

Many instructors would have used metaphors to explain a point in their strategy class.

Most of the time metaphors are used mainly as a heuristic tool. They are often used briefly and occasionally as rhetorical metaphors. Cognitive metaphors extend the use of metaphors beyond this and can instead help stimulate discussion. The use of sports as cognitive metaphors in teaching strategy and strategic thinking has the potential to develop the thinking skills and abilities needed to be an effective strategist. Each type of sports is governed by a set of rules, logic and winning formula. However, the different types of sports differ considerably. Even though the aim of every player is to win, the key success factor and capabilities needed to win is unique to each sport. In fact, the key success factors differ across different matches in a particular sport. For instance, badminton and tennis are similar in that both use rackets, are played on courts and the players are separated by a net. However, the skills needed to excel in these two sports differ considerably. The similarity between badminton and tennis is the importance of hand-eye coordination and the ability to mislead the opponent when making a stroke so as to have him run in a different direction from where the player intends to send the ball or shuttlecock. However, badminton requires the ability to use wrist in maneuvering the racket to hit the shuttlecock to the desired direction. Tennis, on the other hand, requires arm strength without the use of the wrist. This example shows how sports metaphor can be used as a vehicle to help students develop analogical abilities in assessing the difference and similarities between situations.

The potential to use sports as a cognitive metaphor is due to the fact that most students have a certain degree of familiarity with the main sports but do not necessarily have a deep understanding of the key factors that will determine how to win a match. Thus, while the use of sports as a cognitive metaphor provides something most of us can relate to, a deeper understanding of the different key success factor requires that we explore deeper the dynamics of a sport. Performing this will help sharpen the students' critical thinking as well as divergent thinking.

Sports can be used as a cognitive metaphors in three basic ways. First, is to use different sports for comparison and stimulate a discussion on similarities and differences as well as about key factors for success. An example is a comparison between American football and soccer. Soccer is played in two halves lasting 45 minutes each whereas American football has many pauses and are played in four quarters of 15 minutes each. And soccer players use their feet whereas American football is played with both hands and feet. American football is more choreographed with teams relying on well developed playbooks to plan their moves. Teams practice these moves repeatedly to ensure their smooth execution during matches. Soccer on the other hand, is less structured and choreographed. Teams decide on basic issues such as their formation, which opponent player to be marked, pace of their game but players have considerable flexibility and autonomy in how they play the game and how they conduct an attack. The more choreographed nature of American football makes the team behave more like mechanistic organizations compared to soccer. On the hand, the greater flexibility that players have in deciding on their moves in soccer makes the sport resembles organic systems. Students can then be steered to use this insight to think about the different key factors for success in the competition in the fast food industry compared to management consultancy.

The second approach is to use a match in a particular sport to discuss why the winning team won and their relative advantage over their opponents. An example is a comparison of the match between Spain and the Netherlands during the 2010 World Cup finals. Both teams have a

strong reputation. Recognizing that their opponent have some very capable players, the Spanish team relied of good passes between their players to gain control over the tempo and progress of the game. And to ensure higher scoring chances, the Spanish avoided long range shots. The Dutch, on the other hand, relied on long range shots that did not succeed in getting into the goal. The Spanish were also skillful in exploiting weaknesses in the Dutch defense by making attacks from the sides, drawing out the less agile Dutch defenders, and then making a pass to the centre for the final kill (Farah, 2010a). The use of this historic match as a metaphor enables students to discuss the dynamics of the game and develop their ability to dissect the key success factors and relative advantage in the strategy and tactics used by the teams. For instance, students can be encouraged to identify the relative advantage Spain had over the Dutch in deploying its strategy. Lessons can be drawn on the importance of good execution, adaptiveness and the ability to exploit opponent's weaknesses. Here also, students can then be asked to use lessons drawn from this match to compare Apple with Samsung in the way they compete in the smartphone market.

The third approach is to use the top teams as comparisons and to get students to explore and identify what makes these teams consistently outperform other teams. A discussion along this line will not only help students identify key factors for success and relative advantage, it can also get them to identify how each team configure its resources and help them identify rare and tacit capabilities that the top teams have. For instance, the Brazilian national team, is probably the strongest team in the world, being the only team to have won the World Cup five times. Their success is attributed to a number of strengths (Farah, 2010b). This includes highly skilled players, defenders with good tackling skills and good passing technique. Their midfielders are very good at dribbling and quickly push the ball to the strikers for the final kill. And their strikers are known for being creative and attack minded. Here students can be encouraged to examine how seamless execution that exploits the individual strengths of Brazilian players is crucial. They can use this understanding to compare soundly executed and poorly executed strategies. For instance, in the discount airline segment, why does Southwest Airline continue to thrive whereas People Express collapsed? Why was it that the Hong Kong based discount airline Hong Kong Oasis Airline failed (Stanley, 2008)? How can the insights from the Brazilian team be used to understand how Southwest configure its resources to support its competitive approach?

In each of the three possibilities mentioned above, the answers are not obvious and will require considerable debate among students. This provides the opportunity for each student to offer his analysis and arguments to support his views. The use of sports as cognitive metaphors also goes beyond simple descriptions offered by rhetorical metaphors. Students can examine a phenomenon from various angles. In terms of teaching strategy, it enables instructors to not only describe which teams are superior compared to their rivals but also how these teams develop their strengths. In other words, instructors can use cognitive metaphors to generate insights from an Industrial Organization perspective as well as a Resource Based View of competitive strategy. Thus, cognitive metaphors can serve as an integrative tool that help students link various theoretical perspectives in strategy.

Zhou&Heineken (2009) argue that the use of metaphors to conceptualize a theoretical construct or communicate new knowledge in an academic setting requires that the metaphor is carefully selected and presented in appropriate contexts so as to ensure that the students can easily derive the intended metaphorical meaning. We propose some specific steps that instructors

can take in using metaphors to teach strategy includes:

1. Instructors need to choose a sport that are more commonly known to most students. In most countries it is easier to use soccer or tennis as metaphors than lacrosse or Gaelic football. This will enable them to examine these sports. Their understanding doesn't have to be thorough or complete. The basic idea is to use the lack of complete understanding to stimulate sense making in the discussion.

2. Students should be encouraged to do some background reading to familiarize themselves the different types of sports and games. Instructors can also get students to watch a match to gain more understanding of the dynamics of game. It is not necessary that everyone has the same interpretation of the match. The ensuing discussion should be an opportunity to share their insights.

3. Instructors need to rely on the use of questioning to stimulate debate and discussion about the metaphor and how the insights from a particular sport or match can be used in business situations. They need to resist the temptation to lecture and feed answers to students. Questioning should be used to help students explore ideas, alternative explanations and see parallels in between metaphors and business situations.

CONCLUSION

The use of cognitive metaphors in teaching strategy is meant to complement other methods. It can help make class discussions more alive. Sports, because of its competitive nature, can help students examine problems with the context of rivalry that businesses usually encounter. We believe this help make the discussion more lively and insightful to students.

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