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## OUT OF CONTEXT: USING METAPHOR TO ENCOURAGE CREATIVE THINKING IN STRATEGIC MANAGEMENT COURSES

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*Business strategy requires skills in thinking creatively as well as analytically. Materials commonly used in teaching strategic management—traditional texts, case analyses, and simulations—are effective at exposing students to the analytical dimensions of strategy. However, materials that foster creative thinking are scarce. This article presents an approach to teaching strategic management based on metaphors from a variety of nonbusiness realms. A reading list is described that has been developed and used successfully over the past several years in the strategic management course at University of the Pacific. Specific ways to integrate these materials into an existing curriculum are detailed.*

**Keywords:** *metaphor; creative thinking; strategy and creativity; strategic management; strategic thinking*

Strategic management is arguably among the most challenging business courses to teach. Normally the capstone of a business degree, the course is

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highly interdisciplinary and requires integration of the conceptual and operational levels of management. In undergraduate strategic management courses, students who have little if any direct experience with the upper levels of an organization must gain an appreciation for the processes company leaders use to conceive and communicate long-term goals and means to reach these goals. Regardless of their individual interests or proclivities, the students have to learn how the various functional areas and skill sets that make up a business work together to implement strategy.

Several tools useful in teaching business strategy have been developed that augment text materials, most notably the case method and computer-based simulations (Thomas, 1998). These tools require that students hone their ability to analyze data and make decisions in a company and, therefore, are highly valuable in educating students in analytically based problem solving. Strategic management, however, requires not only strong analytical skills but also the ability to think conceptually and creatively. It is both science and art. In "The Fall and Rise of Strategic Planning," Henry Mintzberg (1994) distinguishes between the analytical and synthetic approaches to strategic management and argues that organizations benefit from each. But, to Mintzberg, "real strategic change requires not merely rearranging the established categories," through analytically based formal planning, "but inventing new ones" (p. 109). Management scholar H. Edward Wrapp (1998) has argued that an executive must be "skilled as an analyst, but even more talented as a conceptualizer" (p. 39). The hallmark of the most successful business leaders, according to Wrapp, is the ability to make connections between unrelated ideas. But how do students learn to invent new categories and to conceptualize as well as to analyze? These skills are not readily developed via materials currently available to strategic management instructors. Cases do not stretch students' thinking much beyond the scenario presented. Simulations restrict decision making to possibilities programmed into the underlying software.

This article presents a way instructors can encourage creative thinking in their business strategy courses by using materials and exercises based on metaphor. Metaphor not only provides an engaging manner to communicate the often abstract notions of strategy found in more literal materials but also encourages students to think of novel approaches to strategic management. By augmenting traditional texts, simulations, and cases with the creative tool of metaphor, students leave the course with a more complete set of skills—both analytical and synthetic.

## The Power of Metaphor

Poets, philosophers, and psychologists have long recognized the power of taking concepts out of context. To Aristotle (322 B.C.), mastering the use of metaphor was a “sign of genius.” The Spanish philosopher Jose Ortega y Gasset (1948) regarded metaphor as “probably the most fertile power possessed by man.” Metaphors are “an everyday example of creative cognition in action,” write Glucksberg, Manfredi, and McGlone (1997), “they are used either to extend established categories or, if no relevant categories exist, to create new ones” (pp. 327-328). Ward, Smith, and Vaid (1997) view metaphor as “at once evidence of creative functioning in those who produce them, and spurs to creative discovery and enlightenment in those who hear or read them” (p. 14). In *Modern Rhetoric*, Brooks and Warren (1970) suggest that metaphors are effective in large part because “they are concrete and particular; they reflect the world of the senses. They can still excite the imagination” (p. 436).

Metaphor not only enhances conceptualization and creativity but it may also incite action. In their seminal treatise on linguistics, *Metaphors We Live By*, Lakoff and Johnson (1980) argue that “much of cultural change arises from the introduction of new metaphorical concepts and the loss of old ones” (p. 145). Akin and Palmer (2000) note that “metaphors have the effect of both describing and constructing our organizational realities. By naming a situation through a metaphor, we not only give it a rich identity but also engender actions that actually create the reality” (p. 69).

Many business scholars have recognized the power of metaphor. Literature on its use in business is widely scattered throughout academic and trade sources. The role of metaphor in organization change and competitive strategy has been addressed (Armenakis & Bedeian, 1992; Cleary & Packard, 1992; Hill & Levenhagen, 1995; Hunt & Menon, 1995; Reger, Mullane, Gustafson, & DeMarie, 1994). Sweetman (1997) discusses the value of metaphor over logical analysis when seeking new ways to approach business issues. Other literature describes metaphor-based techniques that have actually been used in companies (Karon, 1987; Marsh, 1998; South, 1995). Several books are available that focus on lessons in business management from a specific metaphorical context, for instance, Antony Jay’s *Management and Machiavelli: Discovering a New Science of Management in the Timeless Principle of Stagecraft* (1994); *Sun-Tzu and the Art of Business: Six Strategic Principles for Business* (1996) by Mark McNeilly; and *Power Plays: Shakespeare’s Lessons in Leadership and Management* (2000) by John Whitney

and Tina Packer. In *Images of Organizations* (1998), a book widely read in both academic and business circles, author Gareth Morgan uses a variety of metaphors to help managers understand and shape their organizations. The use of metaphor and liberal arts literature in management education also has been described (Harrison & Akinc, 2000; Lengnick-Hall & Lengnick-Hall, 1999; Luechauer & Shulman, 1998).

The following discussion focuses on the use of metaphor to encourage creative thinking in strategic management courses at the undergraduate level. Materials and techniques are presented that have been used for several years in a strategic management course at University of the Pacific (UOP). A set of articles is described that brings together materials related to strategy from a wide variety of nonbusiness realms: athletics, military strategy, philosophy, science, and art. The specific manners in which these materials can be integrated into strategic management courses then are described. An assignment is detailed in which students invent their own metaphor for business strategy. A sample of original metaphors that have been developed by students in the course is provided, which illustrates the imaginative and insightful thinking that is unleashed. Finally, the challenges of incorporating metaphor into undergraduate strategic management courses are addressed.

### Synopses of the Metaphor-Based Articles

The articles used in UOP's course have been gathered and used over the past several years (see Appendix A). These articles have been selected because each draws lessons in business strategy from a nonbusiness context and together they represent a wide variety of contexts and authorship. Integrating several of these articles into a course versus using a single book that focuses on metaphor gives instructors more flexibility and also allows them to expose students to many different metaphorical contexts and viewpoints. Strategy demands looking through many lenses. Akin and Palmer (2000) write,

There is a growing realization that effective managers are able to utilize multiple metaphors to comprehend and manage organizational situations. Use of a limited array of metaphors can trap managers by narrowing the options they perceive as open to them in responding to new (and old) situations. Indeed, whole organizations can become locked culturally into a narrow use of metaphors and a correspondingly narrow view of the organizational world. (p. 71)

The articles listed in Appendix A represent the metaphorical contexts of athletics, the military, Eastern and Western philosophy, evolutionary biology, cultural anthropology, pottery making, and music.

- In “Baseball, Football, and Basketball: Models for Business,” Keidel (1984) uses three seminal American sports as metaphors for business strategy. He emphasizes the differences among the athletic models—and the types of companies they resemble—in terms of the way they are coordinated, and the responsibilities and limitations of their leaders.
- In “To Build a Winning Team,” by Rapaport (1993), football coaching legend Bill Walsh argues that a successful performance requires that leaders in sports and business recognize and overcome the limitations of the football model—most notably hierarchy and top down communication and control.
- Cummings (1995) reaches back to Athenian military strategy in his article, “Pericles of Athens: Drawing From the Essence of Strategic Leadership.”
- Chen (1994), the author of “Sun Tzu’s Strategic Thinking and Contemporary Business,” sees many parallels between the *Art of War*, written in the 5th century B.C., and the battlefield of business.
- In “Would You Want Machiavelli as Your CEO?” Wagner (1995b) clarifies two poles of a leadership style continuum by drawing from Machiavelli’s 16th century political treatise, *The Prince*, and the ancient Chinese *Tao de Ching*.
- In “Managing Change: Views From the Ancient Past,” Wagner (1995a) draws lesson in business strategy from the ancient Greek thinkers Heraclitus, Parmenides, Plato, and Aristotle.
- Henderson (1989) applies concepts from evolutionary biology to strategic management in “The Origin of Strategy.”
- In “A Little Bat Sense,” Lloyd (1995) shows how the interaction in nature of the bat with its prey, the Gypsy moth, provides insight into how a business can gain competitive advantage.
- Hurst (1991) uses cultural anthropology to demonstrate the unintended, and sometimes dire, consequences of organizational transformation in “Cautionary Tale From the Kalahari.” Hurst demonstrates how successful strategists weave together the aspects of informal and formal organizations, such that flexibility and adaptability coexist.
- Mintzberg’s (1987) metaphor of potter and clay, in “Crafting Strategy,” is a fertile source of insight into the challenge of integrating the processes of strategy formulation and implementation.
- In “Strategic Decisions and All That Jazz,” Eisenhardt (1997) borrows from the likes of music greats Miles Davis and Dave Brubeck to show how musical improvisation is akin to strategic management in successful high technology companies.

### Guidance for Incorporating Metaphor-Based Articles Into Strategic Management Courses

Appendix B and the discussion below detail the manners in which the various metaphor-based articles have been used in UOP’s strategic management course. The articles can serve as the basis for lectures, as well as for class discussions and exercises in which students assume a more active role. The articles can be used alone or, in several instances, to complement traditional liter-

ature. Trade journal articles and/or cases about actual companies can be used to illustrate the metaphor; examples of several of these are provided. Additional information may be used to enhance the metaphor materials: For instance, the instructor may want to assign students excerpts from the sources that underlie the metaphor-based articles. The column titled "Notes" in Appendix B provides the approximate amount of class time required to use the article. Some of the articles can be covered effectively through lecture/discussion in as little as a 1-hour-long class session; more elaborate exercises that involve two to three readings and group activities may require up to four sessions.

#### **USING THE METAPHOR-BASED ARTICLES TO CONVEY CONCEPTS FROM TRADITIONAL STRATEGY LITERATURE IN A CREATIVE MANNER**

The text used in the UOP course is either Mintzberg and Quinn's (1998) *Readings in the Strategy Process* or Mintzberg and Quinn's (1996) *The Strategy Process: Concepts, Contexts and Cases*. Both of these texts are made up of a collection of literature on business strategy. Several of the metaphor-based articles provide a creative way for students to understand or build on the concepts of strategy addressed in these texts or other traditional sources of literature. As is specified in Appendix B, Keidel's (1984) "Baseball, Football, and Basketball: Models for Business" complements Mintzberg's (1996) "The Structuring of Organizations." Mintzberg's (1987) "Crafting Strategy" complements Quinn's (1978) "Logical Incrementalism." Wagner's (1995b) "Would You Want Machiavelli as Your CEO?" complements Mintzberg's (1984) "Who Should Control the Corporation?" Cummings's (1995) "Pericles of Athens" and Chen's (1994) "Sun Tzu's Strategic Thinking and Contemporary Business" are valuable starting points for a discussion of the important manners in which cultural context affects strategic thinking. These articles can be used in conjunction with, for instance, Pucik and Hatvany's (1983) "Management Practices in Japan and Their Impact on Business Strategy."

#### **APPLYING THE METAPHOR-BASED ARTICLES TO CONVEY NOVEL APPROACHES TO STRATEGIC MANAGEMENT**

As is described in Appendix B, some of the metaphor-based articles can be used to convey novel ways of formulating and implementing business strategy, which generally are not addressed in traditional texts. Included are Rapaport's (1993) "To Build a Winning Team: An Interview With Bill Walsh," Hurst's (1991) "Cautionary Tales From the Kalahari," Eisenhardt's

(1997) "Strategic Decisions and All That Jazz," Wagner's (1995a) "Managing Change: Views From the Ancient Past," Henderson's (1989) "The Origin of Strategy," and Lloyd's (1995) "A Little Bat Sense."

#### **APPLYING CONCEPTS FROM METAPHOR-BASED ARTICLES TO ACTUAL COMPANIES**

The authors of most of the articles apply their metaphorical concepts to actual companies. However, the instructor will often find their own examples from trade and other literature to illustrate application of the metaphors to business. Citations for trade and other literature used in UOP's course are provided in Appendix B. For example, Mintzberg's (1987) "Crafting Strategy" lends itself to a discussion of how leaders approach the strategy process in their companies—in a highly controlled and a priori manner, or a less rational but more creative manner, or somewhere in between. Former CEO of Ford Motor Company, Jacques Nasser, instituted processes to de-emphasize the overly analytical culture he believed had stifled the company's growth. The principles of Eastern strategy discussed in the articles by Chen (1994) can be applied to the Sony Corporation. As the influence of Japanese founders Ibuka and Morita has waned, it appears that many Western concepts—such as emphasis on the bottom line—are behind the company's strategic transition. Applications will vary, of course, given events occurring at the time the articles are used. This requires that the instructor be alert for relevant examples when routinely reviewing literature and other materials.

#### **USING LITERATURE THAT UNDERLIES THE METAPHOR-BASED ARTICLES**

The instructor may also choose to have students read the source material behind the metaphor. Appendix B provides several examples. Excerpts from Machiavelli's *The Prince* and the *Tao de Ching* may be used in conjunction with Wagner's article "Would You Want Machiavelli as Your CEO?" The instructor can facilitate a discussion in which the salient points of the metaphor are essentially rediscovered by the students. Several of the metaphor-based articles incorporate frameworks that the instructor can use to guide the discussion.

### **Original Metaphor Assignment**

Incorporating the metaphor-based articles into strategic management courses familiarizes students with the value of metaphor to creative strategic



thinking. However, the most challenging assignment—and the one that most effectively sparks the students' imaginations—is to have them invent their own metaphor for business strategy and present it to the class.

In UOP's course, students are made aware from the first day of class that they will present a paper on an original metaphor for business strategy near the end of the semester. The assignment is detailed further after one or more of the metaphor-based articles have been used in class, which is normally around mid-semester at UOP. The students then have a better sense of what is meant by applying concepts from a nonbusiness realm to business strategy. About 1 month prior to the presentations, the students are again reminded of this assignment and encouraged to think of an idea to develop. Although some students grasp the assignment readily, others are less comfortable with metaphorical thinking. The instructor may suggest that the students use a realm of interest to them outside of business school: for instance, participating in theatre, dance or musical productions, sports, or martial arts. For those students who still struggle to find a topic, the instructor might recommend searching journals or news articles for metaphors that other people use in business. The Internet and electronic databases are of obvious help here. Using search terms such as "business" and "metaphor," or "business" and "tennis," and so on often unearth relevant articles. (For example, the February 2, 2001, *Wall Street Journal* contained an article about how Siemens CEO Heinrich von Pierer applies tactics from tennis to management.)

In the UOP course, each student makes a 10-minute presentation on the metaphor near the end of the semester. The presentation begins with a description of the metaphor in context and ends with the lessons that can be drawn from it to business strategy: For instance, a student who chose Martha Graham's choreography as her metaphor began by using excerpts from a biography of Graham as well as a video of Graham dancing. Students also are encouraged to provide examples of how the metaphor might be used—or in some cases how it actually is used—in a specific company. Approximately 2 weeks after this presentation, the students are each required to submit a 10- to 12-page essay concerning the metaphor and its application to business strategy.

As is evident from the list of original metaphors in Appendix C, the assignment is highly effective at encouraging students to develop conceptual and creative skills. Metaphors give the students evocative ways of expressing concepts related to strategic management and clearly encourage them to invent new categories for business strategy. It is striking that all of the often highly imaginative—and sometimes erudite—metaphors the students develop have been accomplished at the undergraduate level. UOP students

have drawn lessons in business strategy from chess, gardening, philosophy, fishing, theatre direction, and musical composition. Insight into strategy has been gleaned from water skiing: A student likened a skier's return to the center of the wake in turbulent waters to the way a company returns to its mission when environmental conditions become uncertain. Still another student took on the daunting task of finding a way to express his concern over what he viewed as the baseless appreciation of many U.S. company stocks in late 1999/early 2000. He found solace—and the ability to communicate his fears—in the 19th-century book *Extraordinary Popular Delusions and the Madness of Crowds* (Mackay, 1841). The student detected striking resemblances between the behavior of the “new economy” and past speculative rushes associated with England's ill-fated South Seas Trading Company and Holland's infatuation with tulip bulbs in the 1600s. He began his presentation by giving each of his classmates a tulip bulb and asking how much they would pay for it.

A student described his own experiments in overlaying structured classical music composition with unstructured neotechnical music to suggest that the old and new economies can not only coexist but be integrated. Another led the class in the ancient Buddhist practice of Vipassana meditation. Any skepticism of its applicability to business strategy was quickly dispelled by quotes from CEOs who tout the value of meditation in fostering creativity and providing insight into complex business problems.

The presentation and paper on an original metaphor represents 17.5% of the course grade. The assignment gives students the opportunity and incentive to stretch their thinking. Moreover, listening to the ideas of their classmates exposes them to a myriad of alternative ways to understand business strategy.

### **Challenges to Integrating Metaphor Into Strategic Management Courses**

Use of the metaphor-based articles and the original metaphor assignment poses several challenges to instructors of strategic management:

1. Strategic management courses already require a heavy load of reading, case-work, simulations, and so on.
2. Students—and some instructors—may not feel comfortable with the “illogical” approach metaphor represents.
3. The materials and exercises have been developed for use in UOP's strategic management course and may need to be adapted for use in other contexts.

Each of these challenges is discussed below.

#### MAKING TIME FOR METAPHOR

The use of metaphor is not intended to substitute for more traditional materials: texts, casework, and computer simulations. In UOP's course, the metaphor-based articles and original metaphor assignment augment these materials. They help balance the approaches that emphasize the more analytical and technical dimensions of strategic management. The text required for UOP's course, by Mintzberg and Quinn, was mentioned previously. Smith and Golden's (1999) simulation, *The Corporation*, also is required in the course.

Given the admittedly heavy workload experienced by students in UOP's strategic management course, not all of the articles listed in Appendix A are used each semester. Normally four or five are chosen, and the selections vary from one semester to the next. Strategic management is a four-unit course at UOP and is taught over a 16-week semester. The variety of articles represented in Appendix A, and the range of ways they can be used described in Appendix B, gives instructors a good deal of flexibility as they incorporate metaphor into their courses. Depending on the articles chosen for inclusion—and whether they serve as the basis for a lecture or for more involved exercises—use of each of the articles may require from one to a few 60- to 80-minute class periods. Because class size in the UOP course normally ranges from about 15 to 24 students, presentations of the original metaphors require from two to three class periods. In larger classes, instructors might consider assigning the original metaphor as a group project.

#### GAINING COMFORT WITH METAPHOR

Students and instructors may initially balk at using metaphor in a business course. Doing so requires stepping beyond the rational-analytical approach taken by much of the traditional literature, casework, and simulations related to strategic management. In a *Harvard Business Review* article on the increasingly widespread use of creativity techniques such as metaphor in companies, Katherine Sweetman (1997) warns that “the techniques may make some people feel downright uncomfortable because they require users to let go of logical thinking, have fun, and even indulge in fantasies” (p. 10). Just as corporate leadership is striving to overcome resistance to creative thinking, so must instructors of strategic management courses. As with the addition of any new materials or pedagogical techniques to a course, faculty

must first master the materials and gain proclivity with their use in the classroom.

#### **ADAPTING THE USE OF METAPHOR TO DIFFERENT COURSE CONTEXTS**

The suggestions for using the various metaphor-based articles provided in Appendix B reflect the ways they are incorporated into UOP's course. Although the articles do enhance topics covered in the Mintzberg and Quinn texts, use of the metaphor materials is not restricted to these particular books. The articles are particularly well suited to covering the "softer" dimensions of strategic management: strategy and organization, corporate culture, power relations, and leadership (see Appendix B). Most texts typically have chapters that address these topics. It is the instructor's responsibility to make connections appropriate to the texts and other sources they use; this can be a very stimulating process. Once instructors become familiar with the metaphor articles, uses adapted to their own curriculum, materials, and style will emerge. Moreover, instructors should be on the lookout for newly published metaphor-based articles relevant to strategic management.

#### **Conclusions: The Power of Metaphor to Strategic Management Courses**

The strategic management courses that help prepare students for careers as business leaders should facilitate creativity and strengthen the conceptual skills that are critical to success. Metaphor—transferring ideas from a non-business context to the realm of business strategy—results in enhanced understanding of concepts, more effective ways of communicating, and the invention of entirely new approaches. Instructors will find that the concreteness of metaphors enlivens class discussion and therefore enhances the students' ability to grasp the more literal materials found in academic texts. The concept of logical incrementalism, for instance, is given more meaning when explained in terms of a potter crafting clay. The image of a basketball coach interacting in real time with a team moving dynamically up and down a court allows students to visualize what is required of the leader of an innovative company and to communicate what they understand in an engaging and creative way. Metaphor can also help students learn to invent new categories. The few, simple rules that provide the framework within which talented jazz musicians improvise can guide successful strategic management in high

technology companies. Overlaying the disparate musical styles of classical and neotechnical music informs the integration of the new economy and the old. Finally, exposure to the variety of metaphors represented in the set of articles described, and those invented by the students themselves, leaves everyone—including the instructor—with a rich repertoire of approaches to business strategy.

### **Appendix A** **List of Metaphor-Based Articles for** **Use in Strategic Management Courses**

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#### **ATHLETICS**

- “Baseball, Football, and Basketball: Models for Business” by Robert Keidel (1984)
- “To Build a Winning Team: An Interview With Bill Walsh” by Richard Rapaport (1993)

#### **MILITARY APPROACHES**

- “Pericles of Athens: Drawing From the Essence of Strategic Leadership” by Stephen Cummings (1995)
- “Sun Tzu’s Strategic Thinking and Contemporary Business” by Min Chen (1994)

#### **PHILOSOPHICAL SOURCES**

- “Would You Want Machiavelli as Your CEO?” by Cynthia K. Wagner (1995b)
- “Managing Change: Views From the Ancient Past” by Cynthia K. Wagner (1995a)

#### **SCIENTIFIC AND ARTISTIC CONTEXTS**

- “The Origin of Strategy” by Bruce Henderson (1989)
  - “A Little Bat Sense” by Tom Lloyd (1995)
  - “Cautionary Tales From the Kalahari” by David Hurst (1991)
  - “Crafting Strategy” by Henry Mintzberg (1987)
  - “Strategic Decisions and All That Jazz” by Kathleen Eisenhardt (1997)
-

## Appendix B

### Specific Ways Metaphor-Based Articles Are Used in UOP's Strategic Management Course

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(Listed are metaphor articles; examples of how to use the metaphor articles in lectures, discussions, and application exercises; and notes.)

#### **“Baseball, Football, and Basketball: Models for Business” by Robert Keidel (1984)**

To enhance students' understanding of the strategic implications of different types of organizations.

To encourage students to consider the sort of organization they would prefer to be in and what they would expect of company leadership.

Keidel's article on sports models can be used alone or to complement Mintzberg's (1996) “The Structuring of Organizations,” which identifies six basic types of organizations. After lectures are presented on the Mintzberg article and then the Keidel article, students are asked to discuss (a) the sports model(s) that are best aligned with each of Mintzberg's organizational configurations and (b) the strategic implications of these sports models to business.

Students may also be asked to discuss the organization type and strategic approaches of the companies they are interested in working for. What would they expect from a leader of a baseball-type company versus a football-type company and so on? The Keidel article also often spurs discussion on additional types of sports as models for business (e.g., soccer, tennis, golf, etc.).

If the Keidel article is used to enhance Mintzberg's concepts, this lecture/discussion requires approximately two class periods. If Keidel is used alone, only one class period is necessary.

U.S. students are often knowledgeable (at least as a group) of baseball, basketball, and football. Therefore, instead of having students read Keidel's article prior to the lecture, the instructor can use the dimensions clearly delineated in the comparative frameworks in the article to lead a discussion on the differences among these sports and the implications to business strategy. This makes for a much more interactive discussion.

#### **“To Build a Winning Team: An Interview With Bill Walsh” by Richard Rapaport (1993)**

To illustrate how leaders of large, bureaucratic firms must consider reducing top down managerial styles and increase emphasis on the individual.

Walsh's ideas can be applied to the experiences of large companies that are attempting to regain innovativeness. Students can be asked to discuss if and how the changes Walsh argues contemporary football's coaches must make also carry over to business managers.

If the instructor has also used Keidel's article, students can be asked to discuss which elements of baseball and basketball leadership must be integrated into Walsh's concept of football leadership.

Students can also relate the lessons from this article to companies attempting to maintain or regain innovativeness as they grow. Company information can be drawn from cases and/or trade magazine articles. Examples include Nokia (Baker, Crockett, and Gross, 1998).

The Rapaport article can be presented and discussed in one class period.

**"Pericles of Athens: Drawing From the Essence of Strategic Leadership"  
by Stephen Cummings (1995)**

To introduce students to the historical roots of modern business strategy.

To compare strategies rooted in Western and Eastern thought.

Cummings's article can be used alone to illustrate the ancient underpinnings of modern business strategy in the West. It can also be used in conjunction with Min Chen's article on Sun-Tzu (see below) to contrast Western and Eastern approaches to military strategy, which then can be used as the basis for a discussion of differences between Western and Eastern business strategy.

Concepts of strategic leadership from Western and Eastern sources can be applied to actual companies in cases or current trade magazine articles. For instance, applying Western and Eastern concepts of strategy to the Sony Corporation demonstrates how this company's strategic approach appears to have been Westernized since the death of founders Ibuka and Morita (see "Beating the West," 1999; Quinn & Paquette, 1996; Sakamoto, 1999).

The Cummings article can be presented and discussed in one class period.

Comparing Eastern and Western strategies requires three to four class periods: one to discuss Western concepts (Pericles); one to discuss Eastern concepts; and one or two to have students apply the concepts to an actual company and to discuss findings. If students are asked to apply the concepts to a company example outside class, only one class period may be required.

**"Sun Tzu's Strategic Thinking and Contemporary Business" by Min Chen  
(1994)**

To introduce students to the historical roots of modern business strategy.

To compare strategies rooted in Eastern and Western thought.

Min Chen's article can be used alone to illustrate the ancient underpinnings of modern business strategy in the East. The article can also be used to complement articles on Eastern business practices such as Pucik and Hatvany (1983).

As discussed above, Min Chen's article can also be used in conjunction with Cummings's article to contrast strategic leadership in companies with Western and Eastern roots.

Concepts of strategic leadership from Eastern sources can be applied to actual companies in cases or current trade magazine articles. For instance, applying the

strategic approaches of Sun-Tzu to Larry Ellison of Oracle makes for a provocative discussion, given Ellison's interest in Eastern philosophy (see, for instance, Hamm, 2000).

Chen's article can be presented and discussed in one class period. If the Sun Tzu article is used to enhance Pucik and Hatvany's article, this lecture/discussion requires approximately two class periods.

See description in "Cummings" above.

Because Sun Tzu's *The Art of War* has become more widely disseminated in the United States, the instructor may want to draw from passages in this book and have students read it.

#### **"Would You Want Machiavelli as Your CEO?" by Cynthia K. Wagner (1995b)**

To illustrate two extreme approaches to strategic leadership: autocratic and empowering.

To encourage students to consider how they prefer to be led and to lead.

To demonstrate the implications of autocratic and empowering styles to employees, shareholders, and governmental regulation.

This article is best used to engage students in an exercise in which they (a) contrast the leadership styles derived from Machiavelli's *The Prince* and Lao-tzu's *Tao de Ching*; (b) consider the reactions of employees, shareholders, and government regulators to these leadership styles, using control methods outlined by Henry Mintzberg; and (c) apply these styles to leaders in actual companies.

The exercise begins by introducing students to Mintzberg's corporate control methods. Students are asked to consider which of the methods imply the most and least external control and which suggest the most and least concern for achieving social versus purely economic goals.

The students are then asked to make distinctions between the leadership styles that reflect Machiavelli versus Lao-tzu.

Next, the students consider which of Mintzberg's control methods would be most preferred by Machiavelli's Prince versus Taoism, and they relate this to the previous discussion on external control and concern with social goals. This is followed by a discussion of the control methods the two different leadership styles would elicit from employees, shareholders, and the government. Students come to see that the Machiavellian leader desires freedom from external control and from concern with social goals; this, however, elicits control from employees, shareholders, and the government. The Taoist leader also desires freedom from external control but recognizes the need to attend to social goals. This leader therefore does not elicit strong control from stakeholders.

Finally, students can apply the leadership styles—and the implications to employees, shareholders, and governmental regulation—to an actual company. Sunbeam's former CEO Al Dunlop and Berkshire Hathaway's Warren Buffet provide a striking comparison (see Byrne, 1999, and Bianco, 1999).

This article/exercise is particularly effective in encouraging students to consider critically their own leadership styles and the styles of others.



If the entire exercise is used, it is best accomplished over three to four class sessions. However, the article is used as the basis for lecture; it can be covered in two sessions.

These are delineated in Wagner's article, but the instructor may want to have students read Mintzberg's article "Who Should Control the Corporation?"

A chart useful for interpreting Mintzberg's control methods in light of degree of external control and social concern is provided in Wagner's article.

The instructor may want to base the discussion of the differences between the two styles on the information provided in the article. Alternately, the students can be provided with excerpts from the original sources, *The Prince* and the *Tao de Ching*. The instructor can provide the students with comparative dimensions provided in Wagner's article, and they may work in groups to describe one or both of the two leadership styles. The instructor can then facilitate a class discussion on the two styles.

A chart useful for considering the control methods preferred by the leaders—and the control methods they elicit—is provided in Wagner's article.

#### **"Managing Change: Views From the Ancient Past" by Cynthia K. Wagner (1995a)**

To demonstrate the implications of assumptions concerning change to strategic management.

To illustrate two approaches to managing strategic change.

The instructor leads the students in a discussion of ancient philosophical arguments concerning the existence of change and the implications of these arguments to managing it. The material encourages students to consider more deeply what may change and what may not change in a company. A discussion of Plato and Aristotle provides contrasting approaches to managing changes that are relevant to business strategy.

The Wagner article can be presented and discussed in one class period.

A framework useful to making distinctions between four philosophers (Heraclitus, Parmenides, Plato, and Aristotle) is provided in the article and can be used to help structure the lecture/discussion.

#### **"The Origin of Strategy" by Bruce Henderson (1989)**

To demonstrate an approach to gaining competitive advantage in business derived from Charles Darwin.

The instructor can present the main tenets of Darwin's theory of evolution, and then draw the lessons to business outlined by Henderson. The author provides several examples of how Darwin's concepts can be applied to actual companies. This article can be used alone, or it can be augmented with Tom Lloyd's "A Little Bit Sense" (see below).

Henderson's article can be presented and discussed in one class period.

**“A Little Bat Sense” by Tom Lloyd (1995)**

To demonstrate an approach on how to gain competitive advantage in business derived from the behavior of bats.

This article can be used to augment with “The Origin of Strategy” by Bruce Henderson (see above). The instructor can use Lloyd’s article to lead a discussion on a company’s need to continually innovate.

Lloyd’s article can be included in the one class session that is focused on Henderson’s “The Origin of Strategy” above.

**“Cautionary Tales From the Kalahari” by David Hurst (1991)**

To illustrate the challenges leaders face in maintaining a dynamic, flexible organizational culture as a company grows.

Hurst’s article can be used as the basis for lecture/discussion on the characteristics of dynamic, young companies versus the large bureaucratic, settled organizations they risk becoming. The article is well suited to having students work in groups to contrast the elements that distinguish the phases. These elements—and the ways to integrate the positive aspects of each phase—can then be discussed. Hurst applies the lessons learned from the Bushmen to GE’s Jack Welch’s efforts to revitalize General Electric.

Depending on whether a lecture/discussion style is used with or without group work, Hurst’s article can be covered in one to two sessions.

The instructor may want to have students read the *Scientific American* article referred to by Hurst.

**“Crafting Strategy” by Henry Mintzberg (1987)**

To illustrate the wisdom of augmenting rational approaches to strategy with more creative approaches.

The instructor can use Mintzberg’s article to demonstrate the limits and possibilities of rigid, controlled approaches to strategy and irrational but creative approaches. His “crafting” metaphor can then be used to generate discussion on how these two extremes can be bridged in strategic thinking.

Mintzberg’s “Crafting Strategy” complements James Brian Quinn’s concept of Logical Incrementalism well (Quinn, 1978). After introducing Quinn’s article, the instructor leads a discussion of Mintzberg’s concept of crafting. Students can then be asked to relate concepts from the two articles. For instance, Quinn’s rational analytical approach is similar to Mintzberg’s deliberate approach, and Quinn’s power-behavioral approach is similar to Mintzberg’s emergent approach.

Mintzberg provides several examples of applicability to actual companies in the article. The instructor can also bring in examples such as of Jacques Nasser of Ford (Kerwin & Naughton, 1999).

If used alone, Mintzberg's article can be covered in one session. If used to complement Quinn's article on logical incrementalism, two hour-long sessions are required.

Giving students clay to use as the lecture/discussion is conducted helps to make the metaphor more vivid.

#### **"Strategic Decisions and All That Jazz" by Kathleen Eisenhardt (1997)**

To provide guidelines for strategic management in dynamic high technology companies.

The instructor can use Eisenhardt's article to spur discussion on the challenges of strategy in high technology companies in which product life cycles are short and long-term time frames are blurred. The article on jazz can be used to complement other more literal material by Eisenhardt, such as Brown and Eisenhardt (1998).

The Eisenhardt article can be used alone in a single session. When used to complement other more literal articles or the video, two sessions are required.

As students are often knowledgeable (at least as a group) of different music genres, the instructor may want to discuss the differences among, for instance, jazz and classical. This makes for a much more interactive discussion. The instructor may even want to use examples of jazz and other genres during the lecture/discussion.

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NOTE: A class period lasts a maximum of 80 minutes.

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### **Appendix C**

#### **Examples of Metaphors for Business Strategy**

#### **Developed by Students in UOP's**

#### **Undergraduate Strategic Management Course**

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#### **BUSINESS STRATEGY AND . . .**

- Soren Kirkegaard
- Snowboarding
- Water skiing
- Cooking
- Cesar Chavez and the United Farm Workers
- Bruce Lee's approach to the martial arts
- The music of Mozart and Stravinsky
- Mexican dance choreography
- Golf
- Poker
- Directing theatre
- Designing and maintaining a garden
- Chess
- Sponge painting
- Martha Graham's choreography
- Graphic art

- Vipassana meditation
- Mackay's *Extraordinary Popular Delusions and the Madness of Crowds*
- Making margaritas
- Chinese checkers
- Directing a marching band
- Cleaning a garage
- The English monarchy—Henry VII, Henry VIII, and Elizabeth
- Sungka, the Philippine game of dead people
- The Apollo 13 mission
- The integration of classical and neotechnical music

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