# Discussion Note: Using Metaphors to Understand and to Change Organizations: A Critique of Gareth Morgan's Approach

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## Abstract

A critique of Gareth Morgan's approach to metaphor is used as the vehicle for an assessment of the value of metaphoric thinking to understanding and acting in organizations. Metaphor is shown to be an epistemologically valid approach to making sense of organizations, although not at the expense of traditional literal language approaches. Metaphoric thinking is located within the OD model of organizational change, where it functions as a valuable aid to cognitive change, while sharing some of the limitations of OD itself. Some issues for further research are outlined.

**Descriptors:** metaphor, organization theory, epistemology, organization development, organizational change

## Introduction

Buffeted by competitive pressures in the private sector, and political pressures for greater efficiency in the public sector, practitioners and students of organization have searched for new ways of coming to terms with increasingly complex organizations, and of facilitating the change which a turbulent environment seems to require. Creativity has come to the fore, and any approach which can plausibly claim to foster it is sure of an interested reception.

In this discussion note one such approach is explored, where metaphors are deployed to increase our understanding of organizational life and to promote creative action. Metaphors, it is argued, enable us to see organizations *in a new way*, thus opening up new creative possibilities. Large theoretical claims have been made for this method, with metaphor being seen as the missing link between lay and scientific discourse (Tsoukas 1991), and as an essential element in theory construction (Weick 1989). The scope of this practical application has been equally large: metaphor has been used to shed light on issues which range from organizational structure (Miles and Snow 1995; Reger et al. 1994) and competition (Moore 1993) through organizational change and development (Marshak 1993) to gender relations (Alvesson and Billing 1992; Lewis and Morgan 1994).

Does the metaphorical approach live up to its promise as a new and fruitful technique for understanding and acting in organizations? In order to answer that question, we will focus on the writings of Gareth Morgan, from which many metaphorical studies derive. His writings have been influential; they contain an attempt at an epistemological theory of metaphor; they culminate in a detailed practical application to understanding and acting in organizations; there is a sizeable and growing body of criticisms, emanating from a number of theoretical quarters. All of these factors make Morgan's writings a suitable vehicle for an exploration of the metaphorical approach, especially when we add to them the intrinsic interest which his writings possess.

Morgan makes essentially two claims about the status and value of metaphor. The first is that metaphors, far from being a merely decorative linguistic device, are a fundamental element in scientific thinking; that the process of scientific enquiry is, in fact, a process of finding and elaborating metaphors. The second claim, following from the first, is that if metaphors are fundamental to scientific thought, then thinking metaphorically should give us new insights into how organizations behave, and that those new insights should in turn suggest new possibilities for creative action. These far-reaching claims certainly need to be examined in detail. Yet, while a number of critiques of Morgan's work in this area have appeared (Tinker 1986; Jackson and Willmott 1987; Reed 1990), a detailed examination of its epistemological foundations and its implications for understanding and acting in organizations remains to be conducted.

Although both Morgan's own interest and criticisms of his work have gravitated towards practical applications to organizational analysis in recent years, it is necessary to examine first the epistemological theory of metaphor which he elaborated in the early 1980s. The theory is interesting in its own right, but it also provides a crucial underpinning for his later practical applications.

## Metaphors in Theory: The Epistemology of Metaphor

In his early work (Burrell and Morgan 1979; Morgan 1980, 1983), Morgan was preoccupied by questions of epistemology. Kuhn's (1962) view that science did not so much progress as lurch forward in a series of discontinuous paradigm shifts had begun to filter through to organization studies, with Silverman (1970) identifying a dominant organizational paradigm in the then influential systems theory, and attempting to supplant it with a paradigm of his own devising, which he labelled the 'action frame of reference'. (Morgan acknowledges the influence of Silverman's attempt in an interesting autobiographical passage: see Morgan 1983: 11–13).

Morgan's variation on the paradigm theme was to propose, with his colleague Burrell, that organization science was an area in which, rather

than one paradigm supplanting another until it was supplemented in its turn, a number of paradigms could co-exist, each of them spawning theories in a process which corresponded to Kuhn's idea of 'puzzle-solving'. (The reader interested in the four paradigm debate is referred to the symposium on Burrell and Morgan's work which appears in Volume 9, issue 1 (1988) of this journal. However, this proposal created a problem. While Kuhn's original formulation of the paradigm concept was somewhat ambiguous, it was clear that paradigms were supposed to be overarching structures of thought at a level far above that of the individual theory ['views of the social world based upon different meta-theoretical assumptions with regard to the nature of science and of society' was how Burrell and Morgan (1979: 24) described them]. Nowadays, we meet the term 'paradigm' promiscuously at every level of organizational analysis, so that we can even read about the 'personnel selection paradigm' (Smith and Robertson 1993). This may seem an anachronistic concern, but because of it Morgan felt the need for a meso-level concept to link the macro-level of paradigm to the micro-level of theory in an explanation of how paradigms spawned theories.

Shortly after the publication of *Sociological Paradigms*, therefore, he moved to strengthen the link, replacing the weak, untheorized concept of 'analogy' which he and Burrell had employed (see, e.g. Burrell and Morgan 1979: 26) with the more robust, theorized concept of 'metaphor', buttressed with the support of philosophers and linguists like Cassirer and Black (Morgan 1980: see, especially, pages 609–611). The four paradigms, he now told us, generate 'schools of thought within organization theory [which] are based upon the insights associated with different metaphors for the study of organizations . . . the use of metaphor serves to generate an image for studying a subject' (Morgan 1980: 611).

Morgan used this newly forged link to develop the insight that scientific inquiry is essentially a metaphorical process; an insight which is fundamental to his later works. It is the organizing principle that informs *Images of Organization*, where organization theories are treated as instances of metaphor, and also *Imaginization*, where Morgan extends the insight to argue that managers are practical theorists, and that metaphor is therefore of fundamental importance to them too (Morgan 1986: 345–346; 1993: 276–280). We might expect that Morgan would present detailed arguments to support a view which was to have such repercussions in his later work. Yet at this crucial point in the development of his model there is a hiatus, where, instead of argument, we have a battery of bare references to a variety of authors, whose views, taken together, are supposed to 'contribute to a view of scientific enquiry as a creative process in which scientists view the world metaphorically' (Morgan 1980: 611). Nor has he presented a more detailed argument later on and, despite the early attack on his position by Pinder and Bourgeois 1982), see also (Bourgeois and Pinder 1983), largely the

same authorities have continued to do duty in the same way (Morgan 1986: 346, 1993: 277).

In the absence of argument, therefore, we must pursue Morgan's sources to establish whether they provide adequate support for his radical view. In order to make sense of them, we first need to distinguish between two epistemological positions which, following Ortony (1979), we can characterize as 'non-constructivist' and 'constructivist'. Adherents of the former position consider that there is an objective world which we know in an unproblematic way through the direct evidence of our senses. Adherents of the latter position consider that, while there is an objective world, we know it only through our senses which inevitably filter the sense data which they receive and impose their own structure upon it. Morgan's sympathies are strongly with the constructivist position, verging almost on solipsism (Morgan 1983: 12; 1993: 279). In contrast, his critics Bourgeois and Pinder (1983: 609) adopt the non-constructivist position, arguing that 'the description and explanation of physical reality can be conducted with precise scientific procedures that make use of unambiguous language processes', and from it they attack Morgan's assertion of the epistemological value of metaphor.

The 'non-constructivist' position is essentially that of logical positivism, as represented by the early Wittgenstein (1955) and Ayer (1982), among others. Unfortunately for Bourgeois and Pinder, basing their attack on this position means adopting a stance which has little modern scholarly support, as the essays in Ortony's collection demonstrate. To espouse it in the face of its numerous critics places a burden of justification on Bourgeois and Pinder which they do not manage to shoulder. (It is, in fact, one of Morgan's principal achievements that he has brought to the attention of students of organization the weakness of the positivist epistemology on which so much academic inquiry has been based.)

When we examine Morgan's sources in the light of the above distinction, we find that they do support the constructivist position, but that there are significant nuances. There is, granted, some support for Morgan's view that scientific inquiry is *essentially* metaphorical: 'our ordinary conceptual system ... is fundamentally metaphorical in nature', says Lakoff and Johnson (1980: 3); while Brown (1977: 87) tells us that 'the language of science is basically metaphoric'. However, other sources are less categorical. Some of them see metaphoric thinking, more mildly, as *one fundamental characteristic* among others [Jakobson, with his stress on the importance of poetic language as language creativity in its most intense form (Waugh 1976: 22), and White (1978: 7–12), sees the development of figurative thought as an important stage in a child's cognitive development].

Other sources are content merely to assert its importance alongside other conventional language use. Thus Cassirer (1946: 97), pointing out that 'language does not belong exclusively to the realm of myth; it bears within itself ... the power of logic' sees metaphor as an instance

of the pre-logical thinking which *culminates* in factual knowledge. Similarly, Black (1979), arguably the most influential of all these writers and the inspiration for the essays in Ortony's collection, is unwilling to say more than that 'metaphors can, and sometimes do, generate insight about "how things are" in reality', in the same article disparaging the 'enthusiastic friends of metaphor who ... are ready to see metaphor everywhere'.

In the sources, therefore, we can identify a 'strong' and a 'weak' version of the constructivist position. The strong version, espoused by Lakoff and Johnson and by Brown, views scientific language as fundamentally metaphorical, and, by implication, invalidates literal scientific language; the weak version, espoused by Cassirer and Black, asserts that language may be metaphorical, but otherwise leaves literal scientific language undisturbed. The 'weak constructivist' position is by now well established, having withstood searching scrutiny, as the essays in Ortony's (1979) collection attest. We are on firm ground in assenting to Black's contention that metaphor can generate insight into 'how things are'. However, the proposition that language *can sometimes* be metaphorical does not entail the proposition that language *must always* be so. A theory of organization could still be a theory of *literal* language, which latter the assertions of Lakoff and Johnson, Brown and others (see, for instance, Gergen 1992) have not succeeded in abolishing. It is the 'weak constructivist' which appears to be the sounder of the two versions.

What does all this mean for the epistemological status of metaphor? Morgan has convincingly demonstrated that the traditional assumption that language is only scientific if it is literal, is not well-founded, and that metaphorical language has a valid place in scientific inquiry. On the other hand, his view of science as 'a creative process in which scientists view the world metaphorically' goes too far. In the light of modern epistemology, even of Morgan's own sources, we are still obliged to recognize the value of traditional literal language. As we shall see, there is an implication here for Morgan's later, more practical, writings: we must rein back the more dramatic claims which Morgan makes for the value of metaphors in analyzing organizations, regarding them as a useful analytical technique rather than the fundamental and indispensable tool which Morgan claims them to be.

## Metaphors in Practice

We have seen that Morgan's interest in metaphor originated as the solution to the problem of how to make the link between the levels of paradigm and theory in the four paradigm model which he and Burrell had developed. There is the sense that, having articulated it in that context, he then stumbled *post facto* on a potentially practical application. As we move from his early to more recent published work

(Morgan 1986 and 1993), we see a shift of emphasis from understanding as a scholarly activity to understanding as an aid to action (*Images* is pivotal in this respect). A simple model of the change process underlies Morgan's later work (see particularly Morgan 1986: 'Introduction' and Chapter 10; and Morgan 1993: Chaps 1, 2 and 13), which can be represented diagrammatically as follows:

Figure 1          metaphoric thinking → new understandings → creative action

What he is saying is that metaphors function as insights which change our understanding of the organizations in which we work. That changed understanding in turn generates possibilities for creative action. We shall examine the second and third phases of this process in more detail.

### Using Metaphors to Develop New Understandings of Organizations

Does metaphoric thinking lead to genuinely new understandings? (Reed (1990) suggests, on the contrary that, in Morgan's writing, organization theory is transformed into a mere supermarket of metaphors, so that the 'new understandings' are in reality simply the 'off-the-shelf' products of Morgan's imagination which can only be passively consumed. This is an understandable comment on *Images of Organization*, from which the reader is more likely to take away the particular metaphoric products which Morgan has devised (the machine metaphor, the organic metaphor, and so on) than the creative process of metaphoric thinking; and also on *Creative Organization Theory*, where the ready-made metaphors of *Images* are the organizing framework for the course which is outlined in the accompanying instructor's manual (Morgan 1989a, 1989b). However, even in *Images*, Morgan (1986: 342) emphasizes the process of metaphoric thinking as well as the products, and that emphasis is greatly reinforced in his most recent work (Morgan 1993: see, e.g. 29–32). The metaphors presented there are informal and provisional; many of them, in fact, have been coined not by Morgan, but by the managers with whom he has worked.

Moreover, if one reviews the growing body of studies inspired by metaphoric thinking, it is clear that Morgan's influence has led to new and creative 'readings' of organizations. For instance Boyce (1995) uses the metaphors employed by the staff of a non-profit organization to highlight an important difference of perception between the organization's staff and its president, while Lewis and Morgan (1994) use the analysis of metaphors to shed light on gender relations in another voluntary organization (see also Boje 1995; and Taylor et al. 1995).

New, creative insights, maybe; but how valuable are they? Evaluating

metaphors is a major difficulty which has been highlighted by a number of authors (Turk 1988; Tinker 1986: 367; and DeCock 1994: 285). Although non-positivist approaches to evaluation have been proposed by Morgan himself (1983: 383–385, 405–407), and also by Weick (1989) and Bacharach (1989), none of them has obtained anything approaching a consensus. In the absence of agreed evaluation criteria, there is the danger of a 'pro-innovation bias' (Abrahamson 1991) where metaphors appear which are trivial or which re-invent the wheel. Consequently, Morgan's 'strategic termite' metaphor (Morgan 1993: 41–63), for instance, largely duplicates Peters and Waterman's (1982) notion of 'strategic opportunism'. There do appear to be grounds for Pinder and Bourgeois' (1982: 644) complaint that 'There is no means ... to determine the goodness of fit of a metaphor ... we cannot be sure that unsuitable metaphors will be culled from the field by regular scientific means'.

We noted earlier that Morgan's more far-reaching claims for the epistemological status of metaphor are not soundly based, and that literal language approaches retain an equal epistemological status. Perhaps, therefore, a solution to this difficulty is to be found in the method proposed by Tsoukas (1991), where metaphorical insights are used at an early stage in the process of theory construction, but are then transformed into literal, 'scientific' language later on. It gives metaphor a status very similar to that of 'conjecture' in Popper's epistemology, and allows us, consequently, to use Popperian or other standard evaluation procedures. While this might appear to go against the grain of Morgan's epistemology, it is interesting to note that Morgan himself (1983: 383–385) explicitly accepts Popper's (1969) view that knowledge grows through rigorous criticism of theories, treated as hypotheses, leading to the formulation of better theories.

## Using Metaphors to Promote Creative Action: Metaphorical Thinking as OD Practice

In the simple model presented in Figure 1, the third phase of the practical application of metaphoric thinking is creative action. Morgan sets out his argument in the 'Introduction' to *Imaginization*. Improving our ability to 'read' organizations, he says, enables us to generate new images of organizations which match changed organizational environments. This, in turn, develops shared understandings (as where a company president encouraged staff to think about their situation as one in which they were rebuilding their house while still continuing to live in it), which empowers individuals who have been trapped in outmoded images of their own roles. Thus, finally, what Morgan calls 'self-organization' is generated, which is supposed to encourage openness to novelty and creative energy.

We noted earlier that there is the sense that, having developed his model

of metaphoric thinking to solve an epistemological riddle, Morgan
stumbled *post facto* on a practical application. That application has
taken him, almost unawares, into the territory of organizational change,
specifically of the Organization Development (OD) model of change.
OD is a contested term, but from French and Bell's (1973: 65) classic
definition of 'a long-range effort to improve an organization's problem-
solving and renewal processes, particularly through a more effective
and collaborative management of organizational culture' to its recent
restatement by Porras and Silvers (1991: see, especially, the diagram
outlining the OD process on p. 53), there is the consistent idea of cognit-
ive change at the level of individuals and groups, leading to behavioural
change and thus to improved organizational performance. In this con-
text, metaphoric thinking can be seen as a technique facilitating what
Porras and Silvers (1991: 57) call 'gamma change', which they define
as a change in the configuration of an existing paradigm or the replace-
ment of one paradigm with another (they give as an example, the
replacement of a 'production-driven' paradigm by a 'customer-
responsive' paradigm).

Such a technique has obvious attractions, especially in a pedagogical
context. However, if it is acceptable to align metaphoric thinking with
the OD approach, then metaphoric thinking must share OD's limita-
tions. It is not appropriate here to discuss those limitations in detail,
but we may note the failure to address issues of power (Bennis 1970;
Mangham 1980), an area where Morgan himself has been accused of
failing (Tinker 1986; Boje and Summers 1994; and also the longstand-
ing scepticism about the possibility of a route from individual cognitive
change to organizational change (Katz and Kahn 1978: 658; Blackler
1980), a scepticism which is echoed in Boje and Summers' (1994: 690)
concern with the problem of learning transfer in relation to Morgan's
work. At a time when the emphasis in OD has moved towards 'hard'
issues such as structure and reward systems (Porras and Silvers 1991:
73), it is ironic that Morgan should have moved decisively in the oppos-
ite direction. Despite Morgan's awareness of OD approaches (see
Morgan 1993: 242–248), his lack of awareness of how his model of
metaphoric thinking stimulating creative action relates to established
models of organizational change is a serious shortcoming.

## Issues for Research

It is appropriate now to review areas where further development is
desirable. First, a systematic statement of the epistemological status of
metaphor is needed. In this discussion note, it was necessary to fall
back on the views of writers such as Black and Lakoff and Johnson,
which were developed in a different context. Now that there is a grow-
ing body of applications of metaphoric thinking, a statement of how
much we can expect to learn from them about 'how things are' would

be helpful, especially if the limitations of metaphoric thinking are made explicit.

A methodology for evaluating metaphors is also needed, possibly building on Tsoukas' suggestions. Metaphoric thinking will continue to be vulnerable to the charges of triviality and re-inventing the wheel — what Christopher Booker, the first editor of *Private Eye*, called 'neophilia' — until such a methodology is available and is applied.

We can expect the body of empirical studies which use metaphoric thinking to continue to grow as authors become more confident about its epistemological validity. It is desirable that some of them should be even more frankly literary. Many years ago, the American sociologist Lewis Coser published a book of literary readings designed to teach sociology through literature. In its Introduction he said, 'The sociologist who ignores literature is bound to be not merely a much impoverished man, but a worse social scientist . . . Certain types of knowledge, attained by intuitive (literary) methods, may be harnessed for use in theoretical systematization' (Coser 1972: xvii–xviii). The psychologist Sir Cyril Burt (1964: 19) argued likewise that 'The student of human nature is nowadays too apt to forget that most of what we know about the mind of man is to be learnt from the writings not of scientists but of men of letters — the poets and the philosophers, the biographers and the historians, the novelists and the literary critics'. The literary scholar Tom Henn (1960) advanced similar arguments in relation to the value to physical scientists of studying literature. If metaphor is a valid method for understanding organizations, then the rich metaphors which literature contains should be an exceptionally powerful variant of that method.

Finally, the possibilities and difficulties which we have noted in using metaphoric thinking as an organizational change strategy should be addressed. By drawing on the OD literature, it should be possible to specify the organizational conditions necessary for metaphoric insights to actually translate into organizational change.


## Summary and Conclusion

This discussion note is partly an essay in the history of ideas. The origin of Morgan's model of metaphoric thinking is traced in his early epistemological preoccupations, in particular his need for a device to link the levels of paradigm and theory in his model. We saw that he succeeded in establishing the legitimacy of metaphor as a form of scientific discourse, albeit not at the expense of traditional literal scientific language, whose validity is unimpaired.

Moving on to the practical application of metaphoric thinking, we suggested, contrary to Reed's criticism, that Morgan's approach has led to genuinely new insights about organizations, as evidenced by the growing number of empirical studies which use a metaphoric approach. However, we were sceptical about the extent to which novelty could be

equated with value, given the problem of evaluation, to which, follow-ing Tsoukas, we suggested a solution. As an approach to organizational change, we located the metaphoric approach within the OD model, sug-gesting that it could function as a technique for promoting 'gamma change', but that it necessarily shares the limitations of the OD model itself. Last, we identified some issues where further research is desirable.

Bourgeois and Pinder (1983: 610) complain that Morgan 'never makes totally clear what his position is'. This might seem an unfair criticism of a writer who has published extensively on theoretical questions, and who is, in fact, largely responsible for the prominence which metaphoric thinking has attained in organization studies. Nevertheless, there remains the sense that discussion of key epistemological questions has too often been conducted on the margins of other work, while questions of organizational change have scarcely been addressed at all. Morgan's cast of mind is protean, with a habitual preference for moving on to fresh fields and pastures new rather than consolidating existing work. In terms of Isaiah Berlin's (1953) celebrated distinction which he applied to the writings of Chekhov and Tolstoy, Morgan is a 'fox' (who, in the Russian proverb, knew many things) rather than a 'hedgehog' (who knew one big thing). This characteristic gives his work an impressive fecundity, vigour and density, but it may also militate against a systematic presentation of his main ideas, where due weight is given to his critics and where both limitations and strengths (to use Morgan's favourite opposition) are made explicit. Perhaps, even so, many years after the publication of *Sociological Paradigms*, we may still hope for such a presentation.

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