Jupiter$^\mu$: Closing The Say/Do Gap

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"When I can't talk sense, I talk metaphor."
John Philpot Curran

All enterprises go through phases. One of the more important of these phases involves recognising the importance of listening to the needs of customers. This phase inevitably, at some point, entails recruiting or engaging expensive marketing consultants to help run focus groups, gather anthropological information and, generally speaking, gather a lot of data in the hope that out of it will emerge the occasional nugget of insight. Many organisations find themselves in this 'insight-lead marketing' phase of existence today. The race is on with competitors to see who can uncover the best insights. In many ways, once this competition starts, it is a sign that an industry sector is already approaching the end of the phase. At which point, the poor old consumer tends to be either massively over-served by things they never really wanted, or missing things that they didn't know how to ask for.

The emerging next phase in the evolution of our understanding of human consumption behaviour, perhaps ironically, takes us back in time a hundred years to the aphorism attributed to J.P. Morgan: 'people do things for two reasons; a good reason and a real reason'. Humans, according to Morgan, often display a profound gap between what they say (the 'good' reason) and what they subsequently do (the 'real' reason). Consumer panels and focus groups are really, really good at eliciting the 'good' reasons, but, we now see, hopelessly bad at capturing the 'real' drivers. One response to this problem has been the idea of 'visiting Gemba' – going to simply observe the consumer in their natural environment in the hope that the watching researcher will somehow not influence the subject's behaviour. This way of eliciting the elusive insight is okay for identifying some underserved needs, but again, notoriously bad at helping to capture the big new opportunities.

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Henry Ford coined another famous aphorism, 'if I'd asked the customer, they would've asked for a faster horse'. Our Gemba-visiting researcher is similarly unlikely to observe frustrated horse owners sitting on their buggies making gear-change motions. A person that has never seen a car before is not going to be able to tell you that that's exactly what is missing from their life.
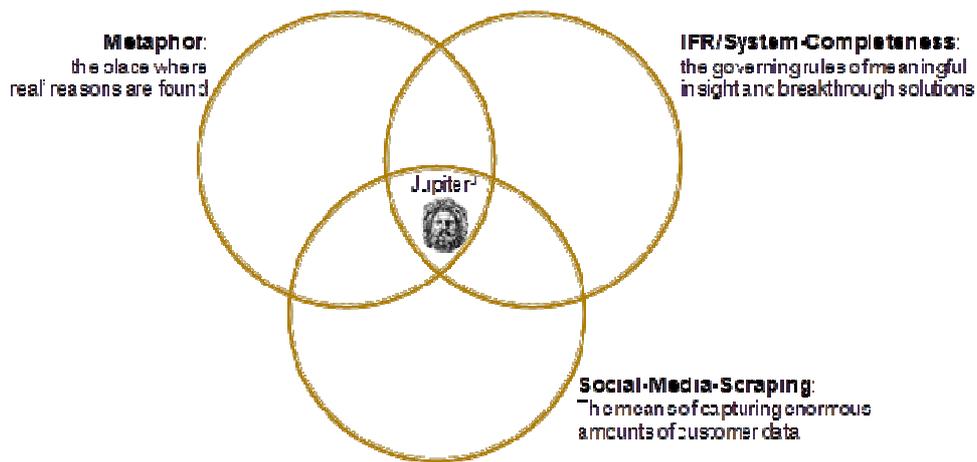
There are, of course, other ways to get to those kinds of faster-horse avoiding mistakes. Steve Jobs turned the art of *not* asking the consumer into a media spectacle, and the twin TRIZ concepts of System Completeness and Ideal Final Result (IFR) turns it into a science. Both represent yet another emerging candidate in what will eventually become the next phase of the human understanding challenge. Most likely they represent a necessary but insufficient part to a much bigger story.

Another set of candidates come from the world of metaphor. Metaphor is at work in all fields of human endeavour, from economics and advertising to politics and business to science and psychology. On average, we utter about one metaphor for every 10 to 25 words, or about six metaphors a minute. Whenever we describe anything abstract — ideas, feelings, thoughts, emotions, concepts — we instinctively resort to metaphor. According to James Geary (Reference 1), "metaphorical thinking is essential to how we understand ourselves and others, how we communicate, learn, discover, and invent. Metaphor is a way of thought long before it is a way with words."

Metpahor is a device for seeing something in terms of something else. It is also, according to several marketing researchers (Rapaille – Reference 2, Zaltman & Zaltman – Reference 3) an effective step in helping to close the say/do gap. A person might say what they think you want to hear, but the metaphors they use to do it invariably reveal what they're really thinking.

Both Rapaille and the Zaltman's have built their consulting businesses around sophisticated methods of eliciting and capturing metaphors from consumers. Their respective methods require these poor people to be interviewed for, usually, long periods of time – Rapaille making great play of the idea that anything said by an interview subject in the first two hours (!) of an interview is essentially value-less. The fundamental problem with this, but ultimately both techniques is that because they require a considerable amount of exposure time with target consumers and (in the Zaltman case) substantial post-interview analysis time, they are expensive to the point of being out of reach of most potential customers. Beyond the question of expense, the highly abstract nature of the outcomes from both the Rapaille ('a jeep is a horse') and Zaltman (a consumer generated collage picture of elephant, strong of pearls, bathtub, flower, diamond and vase is apparently a metaphoric representation of 'new motherhood'), should also indicate that, although capturing the metaphors might be necessary, the outcome is still some way short of 'sufficient'.

The metaphor-as-revealer-of-real-meaning idea is, despite the often abstract nature of the outcome, however, a very solid one. It is our belief that combining this way of looking at the world together with the two aforementioned TRIZ concepts represents an opportunity for another substantial leap forward. Further combining those concepts with another emerging paradigm, this time 'social media scraping' engines, and we have something that, we believe, delivers a true step-change advance in the ability of an organization to capture meaningful insight from massive amounts of input data, in – perhaps most importantly of all given the current economic climate – the most cost effective manner possible. We call this metaphor-TRIZ-media-scraping trinity 'Jupiter[μ]':

Metaphor: the place where 'real' reasons are found

IFR/System-Completeness: the governing rules of meaningful insight and breakthrough solutions

Jupiter

Social-Media-Scraping: The means of capturing enormous amounts of customer data

According to ancient Roman myth, Jupiter was the king of all the gods. And in the Greek alphabet, 'μ' or 'mu' is the letter used to represent the letter 'm'. 'M' in this case standing for metaphor. Before we explain the real significance of the choice of 'Jupiter', it is useful to say a few words about how the metaphor idea and the aforementioned TRIZ concepts sit together.

A good start point is the TRIZ 'Law Of System Completeness' (Reference 4), which in its modern form says that any viable system fundamentally comprises six essential elements. If we consider that the human desire to 'make meaning' is a system, then that system must possess the six elements:
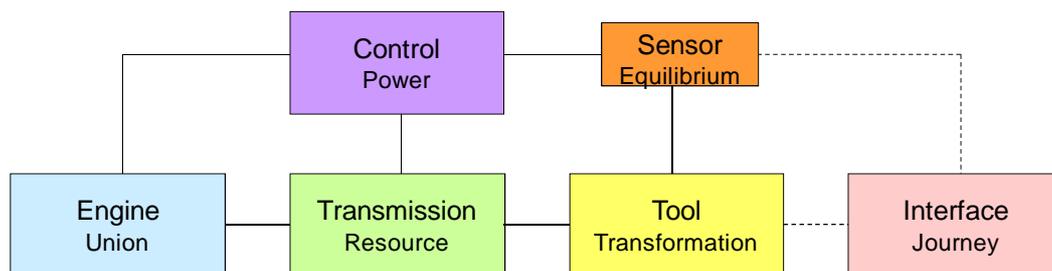
It is also often useful to recognize that some of the elements are clearly 'within' the system, whereas others are outside – i.e. a person can only 'make meaning' if there is a link between that person and their environment. This is akin to the oft used philosophy question, 'if a tree falls in a forest and there is no-one there, does it make a sound?' Answer: 'sound' is a concept that concerns the interpretation of the inevitable air vibration caused by the falling tree, and that interpretation only happens if the air vibration finds its way into a person's ear.

Taking this idea of 'within' and 'outside' the system suggests a useful addition to the six-element model as follows:
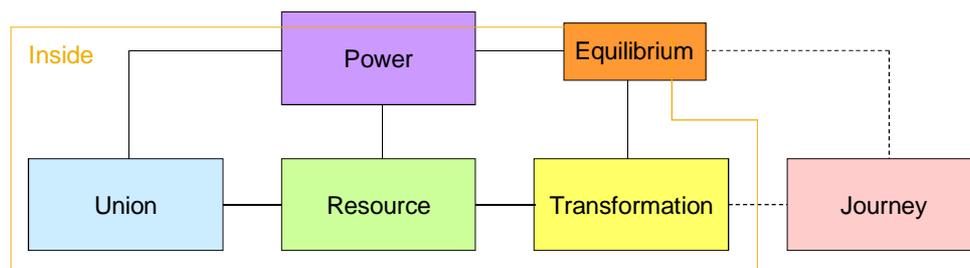
In this version of the image, the original Law Of System Completeness words (engine, transmission, tool, etc) have been replaced with ones that bear a resemblance to the

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seven 'deep metaphors' that lie at the foundations of the Zaltman method and also, taking the idea that several researchers are independently converging on the same basic findings, the 'metaphor vehicles' emerging from the Open University lead 'MetNet' project (Reference 6). We take this resemblance as a positive indication that the research underpinning all of the research has been comprehensive enough to identify all of the necessary elements of the complete system. What the TRIZ perspective adds to the Zaltman, Rapaille and MetNet stories is a collection of words that, we think, connect better to what the essential elements of the system are about. They also, quite conveniently, give us the constituent parts of the 'Jupiter' acronym:

Journey
How the Meeting of Past, Present, and Future Affects Peoples' Thinking
Journey is the external 'interface' part of the 'make meaning' system since the journeys we make are inherently about exploration of all the things – tangible and intangible – that are 'out there' and from which we attempt to make meaning from. People frequently talk about many aspects in life as a journey. Moreover, we often frame life itself as one big journey, including, for many, an afterlife. Sometimes we think of our lives as a brief journey, as in "life is short"; other times we view it as a lengthy, as in "he still had so much life to live," when a journey ends prematurely. Confucius purportedly said, "A journey of a thousand miles begins with a single step." Consider Robert Frost's famous poem, *The Road Not Taken*, in which the speaker says, "Two roads diverged in a wood, and I took the one less travelled." Like Confucius, Frost conveys the unknown nature of many journeys. Other journeys have predictable outcomes, such as knowing that if you "stay on track" at work, you will earn a promotion. Journeys can be fast or slow- "time flies" but "are we there yet?"- or be "an uphill climb" or "all downhill from here."

Union
How the Need to Relate to Oneself and Others Affects Peoples' Thinking
Union is the 'engine' of the 'making meaning' system, and is all about the ability to make connections between different aspects of the world around us. Creativity is all about harnessing this union-making capability. Union (or its opposite, separation) also encompasses feelings of belonging or exclusion: being kept in or out of the loop, identifying with heroes, drawn to celebrities, or breaking up a relationship. We express psychological ownership when we say my brand, my team, my candidate, my kind of person, and MySpace. Feelings of distance and separation from others reflect disconnection, as when losing a friend, missing a pet, or losing a job. Similarly, we cannot shake a cold or get rid of certain people or recurring dreams. Themes of union and separation factor prominently into consumers' thinking about marriage and divorce, having or adopting children, sending kids to college, and giving and receiving gifts.

Power
How the Sense of Mastery, Vulnerability, and Well-Being Affect Peoples' Thinking
Power is all about the desire for control. We human beings need to feel a sense of power or control of our lives. Sometimes we succeed, sometimes we do not. When people "succumb" to a serious disease, they may feel "powerless." Or they may vow not to let "this thing ruin my life." When a lawyer rests a case, she may say the outcome is "out of our hands now," whereas during the case, she may have vowed to "fight to the finish." In our lives, we sometimes feel events "spiralling out of control." When life is calm, we cruise on "auto pilot." We describe ourselves or others as "powerless" or "power-crazed" with respect to habits or addictions, blowing our stack, having a meltdown, throwing a tantrum, or acting as a tyrant. We may lose or regain bodily functions after entrusting ourselves to a surgeon, medication, or a physical therapist. We speak of span of control and empowerment within organizations and of leaders gaining or losing authority. We tame and train animals and feel at the mercy of nature. Social norms arise to control group interactions, and we imprison those who cannot follow these norms.

Inside
How Inclusion, Exclusion, and Other Boundaries Affect Peoples' Thinking
Inside (or outside) is about the boundaries that surround, contain and include or exclude elements of a system. People carry a strong sense of being inside or outside the many borders and boundaries that serve to include or exclude us. Boundaries perform two functions: keeping things in and keeping things out. They can protect us or trap us, can be opened and closed, and be positive or negative. They involve physical, psychological, and social states. We find ourselves in or out of physical shape or condition, in a good or bad mood, stuck in a rut, being 'in with the in-crowd', or born into a social class and family. We prize our privacy and build cocoons around ourselves, and yet feel that others can read us like a book. We take time out or get back into an activity, we feel vulnerable or snug and secure, empty or fulfilled, wrapped up in a novel or left out on the street. We store up our money, energy, and good will. Memories are one of the most vital containers because they internally store our individual histories and identities.

Transformation
How Changes in Substance and Circumstances Affect Peoples' Thinking
Transformation is the 'tool' part of the making meaning system and as such is the thing that actually delivers the intended useful function. Transformation thus involves changing states or status. Metaphorically, we often talk about being "laid low by a cold" or being "up and about," and an antidepressant medication can change a depressed person's outlook on life. Emotionally, if we undergo a major life change, we talk about needing "attitude adjustments" or "turning

over a new leaf." Mothers often think of their roles as transformational; that is, to ensure that their children grow- or transform- physically and emotionally into healthy, functioning adults. But perhaps nothing connotes transformation better than nature's ultimate vision: a humble caterpillar's changing into a beautiful butterfly. Hence, we see butterflies used in hospital designs and in advertisements promoting sleep aids. Transformations can be surprising or expected. Consumers may actively seek or avoid them. For example, children put on makeup to play adult roles whereas adults use makeup to retain a youthful appearance.

Equilibrium
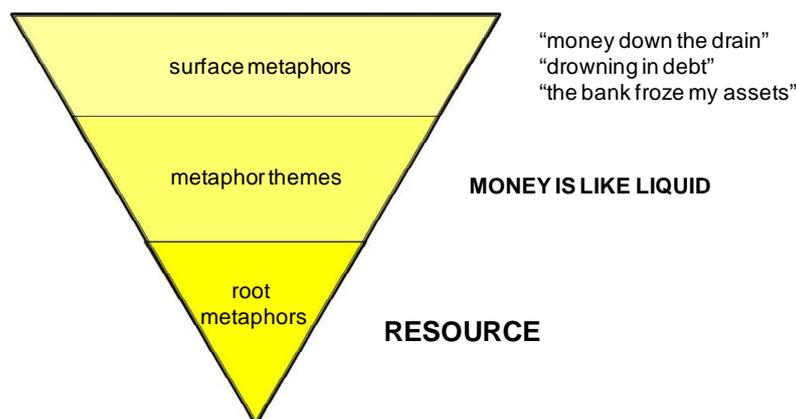How Justice, Equilibrium, and the Interplay of Elements Affect Peoples' Thinking
Equilibrium is all about how we sense how well the meaning-making system is doing its intended job, and as such is all about the desire for harmony and removal of unwanted tensions and stresses. Equilibrium (or its antonym, imbalance) includes the ideas of balance, conflict resolution, adjusting, maintaining or offsetting forces or tensions, and things as they should be. It has many flavours, including physical equilibrium, moral tension, social harmony, and aesthetic and psychological balance. In diet and eating, consumers reveal imbalance in expressions about being overweight or stuffed, while foods that complement each other reflect balance. Social imbalance appears in utterances about marrying above or below one's status, while employment balance turns up in equal opportunity policies, getting one's due, or earning grades. People express psychological imbalance when talking about being out-of-sorts, down, and feeling off, and psychological balance when they say they feel centered, feel inner peace, or are back on track. The equilibrium metaphor connects very closely, too, with another important TRIZ concept – that of contradiction-solving as a primary mechanism of successful change.

Resource
How Acquisitions and Their Consequences Affect Peoples' Thinking
In system terms, resources are all about the means by which the tool (transformation) is connected to the source of energy (union). We need resources to survive. We would die without food and water or a nurturing adult in our infancy. Our family and friends are resources who support us in tough time. Ideas, information, knowledge and wisdom also represent a vital type of resource. An intelligent person is a "fountain of knowledge"; gaining an education is the "key" to one's future. Products and services are also important resources: a woman refers to her cell phone as her "lifeline," and a man describes motor oil as his truck's "lifeblood." Companies also think of their product offerings as resources. For example, Dell may make MP3 players and other gadgets, but its "bread and butter" is the computer. We find resources in nature, man-made creations, or both: a natural athlete hones her skills and deems bottled spring water more health-giving and enjoyable than high-calorie soft drinks.

The seven root metaphors described by the letters that make up 'Jupiter' operate on a level that, in theory at least, taps into the core human drivers. We might say that all of the 6 metaphors a minute that we typically find ourselves using offer the key to some of the key differences between what we say (our 'good' reasons) and what we actually mean (our 'real' reasons). While we might consciously choose many of the words that we speak to satisfy the 'good' reasons we wish to communicate, the root underlying metaphors emerging from our subconscious and pre-conscious mind offer up a lens into what a person is really thinking. This phenomenon occurs because our selection and use of metaphors occurs largely at subconscious or pre-conscious levels, before our prefrontal cortexes have had the opportunity to filter out meaning to articulate what we think others might want to hear.

"money down the drain"
"drowning in debt"
"the bank froze my assets"

MONEY IS LIKE LIQUID

RESOURCE

The MetNet 'metaphor vehicles' sit somewhere across the theme and root levels of a metaphor hierarchy. Conversely, much of Clotaire Rapaille's consumer insight capture methodology works at the top two levels of the metaphor story. His methodology

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essentially involves eliciting surface metaphors that consumers use in relation to a given subject area such that his team is able to piece together the (middle layer in the above figure) metaphor themes that he refers to as 'codes'. His technique represents a good start point; combining his methods with the TRIZ/Zaltman root metaphor hierarchical layer gives the opportunity to paint a far richer picture of the say/do gap.

This then brings us to the third leg on the Jupiter$^\mu$ stool: the ability to search through electronic text in order to identify and infer the presence of metaphors at each of the surface, theme or root levels.

The mechanics by which we're able to do this have in effect been described in another of our articles, where we discussed another aspect of the understanding of people behaviours, Thinking Styles and so-called 'Mental Gears' (Reference 6, 7). Rather than repeat all of those words, suffice to say here that the basic means of capture is to first identify the presence or otherwise of certain keywords or phrases amongst the words that people use, and then contextualising those words and phrases to determine whether their intended meaning is consistent with or counter to the various different themes of the Mental Gears or, in the case of Jupiter$^\mu$, the seven JUPITER metaphors.

Once the basic capability exists, it becomes a very simple job to start scraping any kind of electronic text. The strongest form of input data is typically qualitative, story-based responses to open questions solicited from amongst a peer group. The sample below is a response found on a healthcare discussion forum convened by nurses:

Wound care can be very frustrating. Wounds that are slow to heal or become infected, clients that fail to follow all of our well-meaning wound care instructions, concomitant health conditions that stymie our best efforts to achieve wound closure, wound care orders or instructions that don't adhere to best practice ...We've all "been there, done that".
It's our successes that keep us motivated to continue doing what we do. My most gratifying experience involved a very old gentleman, a double above-the-knee amputee who lost his legs and subsequently developed a huge pressure ulcer on one of his hips. It took more than a year of twice or thrice weekly visits to achieve wound healing, switching products at different stages of wound healing, but we did it! He was one of those patients you never forget, eager to follow instructions, always cheerful and bound and determined to let nothing bring him down. Having the privilege of working with this client made me think that virtually anything in wound care is possible, given the right knowledge and attitude.

The figure below shows an example based on 200+ other story inputs. In addition to analysing the nurse inputs ('customer verbatims'), the scraping engine was also pointed at the advertising literature of one of the product providers in order to make an assessment of the root-metaphor level match (or mis-match) between what the nurses are really saying and what the provider is offering up (presumably on the basis of previously listening to what they thought would resonate with healthcare personnel:

Jupiter μ Map, Groups: 7 - Total Perceptions: 201 - Total Weight: 201
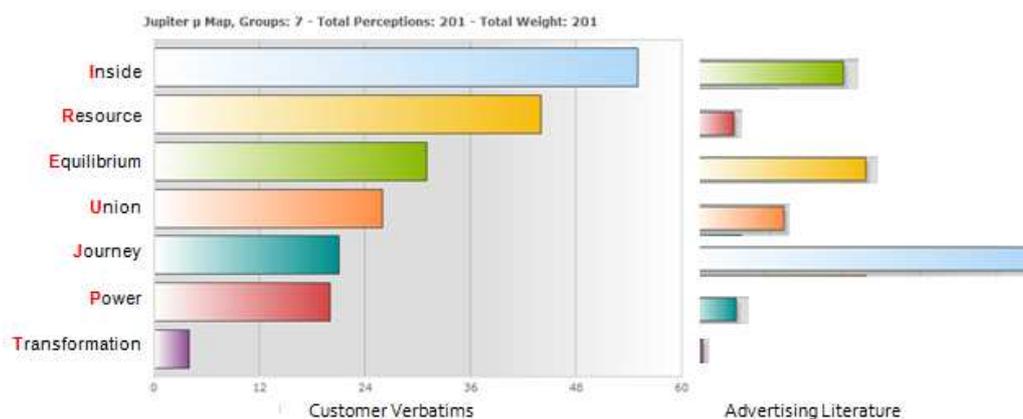
Without knowing any more about either the product or customers, what this picture immediately reveals is a significant root-metaphor mismatch between what the nurse customers are saying and what the company is communicating.

What the company should do about this mismatch is another matter – something we will no doubt cover in a more detailed case study article – for the moment, the main thought to leave the reader with here is that tapping in to root metaphors provides what we believe is an important step forward in helping to close the say/do gap. Not the only step by any means – see our related papers on other component parts of a bigger picture – but an important step nevertheless. One that takes a previously nebulous aspect – root metaphors – of what *really* motivates people and turns it into objective, quantifiable, actionable knowledge.

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