

**'Symbolic Modelling' as an innovative phenomenological method in HRD  
research: the work-life balance project**

Dr Paul Tosey  
Senior Lecturer  
School of Management  
University of Surrey  
Guildford, Surrey GU2 7XH  
UK

Tel. +44 1483 689763  
[P.Tosey@surrey.ac.uk](mailto:P.Tosey@surrey.ac.uk)

Stream: Critical, theoretical and methodological issues in HRD  
Submission type: fully refereed paper

Key words: phenomenology; symbolic modelling; clean language; metaphor; work-  
life balance

**Acknowledgements**

I wish to acknowledge the project team that collaborated on the work-life balance study and co-authored the project report: James Lawley, Margaret Meyer, Rupert Meese, and Wendy Sullivan (Clean Change Company). Sarah Nixon (Liverpool John Moores University) was academic advisor to the project. We wish to thank all interviewees for participating in the study; and Hazel Catlin for transcribing the interviews.

The project was funded by the University of Surrey, School of Management, in partnership with the Clean Change Company:  
<http://www.cleanchange.co.uk/cleanlanguage/>.

The project report is available at:  
[http://www.surrey.ac.uk/management/people/paul\\_tosey/](http://www.surrey.ac.uk/management/people/paul_tosey/)

## **'Symbolic Modelling' as an innovative phenomenological method in HRD research: the work-life balance project**

### **Introduction**

Gibson and Hanes ( 2003) argue that phenomenology can make a significant contribution to research in Human Resource Development (HRD). Conklin suggests that studies such as Gibson's ( 2004) investigation of the experience of being mentored for women faculty provide support for the use of phenomenology to enquire into 'organizational phenomena and managerial behavior' and reports ( 2007:285) that Gibson and Hanes;

'identify multiple outlets within human resource development research for the employment of this approach, including insights into the experience of working in human resource development and understanding the meaning of participants' experiences of particular organizational phenomena.'

Conklin also identifies challenges to phenomenology, based for example on questions about the limitations of reflexivity (Alvesson, Hardy, & Harley 2008) and about the assumptions embedded in the transcendental approach taken by Edmund Husserl, the founder of phenomenology. Among those challenges are concerns about:

- The tacit use of the authority of the phenomenological researcher to decide what is important or relevant in an interviewee's account;
- The argument that the researcher creates, and does not just record, meaning;
- The difficulty of achieving *epoche*, a central feature of phenomenological research whereby 'a researcher attempts to put in abeyance

presuppositions and prejudices she may carry with her into the field.'  
(Conklin 2007:277).

This paper addresses these methodological problems by reporting on the application of an innovative, metaphor-based practice called 'symbolic modelling' (Lawley & Tompkins 2000) as a research method through a project that explored work-life balance as experienced by six managers. The paper argues that symbolic modelling is a method through which the above problems can be managed more systematically (though not removed). Specifically, symbolic modelling is able to:

- Distinguish clearly between metaphors introduced by a researcher into their questions or as an interpretive device, and those that originate in, belong to, and faithfully represent, interviewees' subjective worlds. While the researcher still makes decisions about where to direct attention, the method increases confidence that the meaning being explored is that of the interviewee.
- Make the interviewee's metaphor the focal criterion for the relevance or significance of interviewee data.
- Provide explicit and systematic principles and techniques that can be shared and discussed by researchers, thereby increasing the transparency of the process of interpretation.

In order to explore the potential of symbolic modelling as a method of phenomenological interviewing, the author led an empirical project in collaboration with practitioners that explored managers' experiences of 'work-life balance'. Work-life balance was chosen because it is an issue of contemporary relevance to employers and employees, and because previous research had pinpointed and questioned the metaphor of 'balance' embedded in the notion of work-life balance (Cohen, Duberley, & Musson 2009); (Roberts 2008). The project, a collaboration between the University of Surrey and a practitioner organisation, the Clean Change Company, is believed to be the first to explore symbolic modelling through formal empirical research.

This project applied symbolic modelling in order to elicit the naturally occurring metaphors of six mid-career managers in the UK, relating to the way they experienced work-life balance. The analysis yielded a unique metaphor landscape for each manager. A key finding is that, although the 'work-life balance' metaphor is widespread, not one of the interviewees' main metaphors overtly involved 'a balance'. However, a number of their metaphors implied some form of *balancing*, for example 'juggling', 'surfing', or being in 'equality'. The follow-up interviews revealed that all of the interviewees had remembered their main metaphors, with some describing changes they had made after being facilitated to explore their metaphor landscapes.

The study illustrates potential enhancements that symbolic modelling and its questioning techniques can bring to phenomenological interviewing and analysis in HRD research. The results also have implications for the understanding of work-life balance, and for managers and human resource professionals who are dealing with work-life balance issues in the workplace.

### **Symbolic modelling and its origins**

Symbolic modelling is 'a method of facilitating individuals to become more familiar with the organisation of their metaphors so that they can discover new ways of perceiving themselves and their world' (Lawley & Tompkins 2000:xiv). Informed by the philosophy of embodied mind (Lakoff & Johnson 1999), symbolic modelling is used in HRD as a contemporary method of management coaching, where it is known chiefly by the name of its operational model of questioning, 'Clean Language' (Sullivan & Rees 2008).

Originated in the 1980s by counselling psychologist David Grove from his work with trauma victims (Grove & Panzer 1991), 'Clean Language' is a method of questioning that facilitates a person's exploration of their inner world – their own, naturally occurring 'metaphor landscape'. Grove's discovery, substantiated by twenty-five years of experiential research through clinical practice, was that

facilitating a client to remain immersed in these landscapes enabled effective resolution of issues to take place. Grove's technique came to be known as 'Clean Language' because of its absolute fidelity to the client's inner working model of the world. A central and significant feature of the practice is that the practitioner's interventions remain as free as possible from the practitioner's own metaphors and assumptions; hence the notion that the interviewer's language needs to be 'clean'. For this reason, 'Clean Language' questions are characterised by their unique form, which is designed both to minimise the interviewer's content and to prioritise the client's own experience. The basic set of 'Clean Language' question is shown in Table 1.

In the 1990s Grove's distinctive methods were studied over some years by psychotherapists Penny Tompkins and James Lawley (Lawley & Tompkins 2000). Tompkins and Lawley not only began to theorise the practice, drawing on theories of metaphor and embodied cognition as developed by, for example, Lakoff and Johnson (1980), but also made it more widely accessible. Training courses now support a growing practice and an ever-expanding range of applications of 'Clean Language' across business<sup>i</sup>, education and medicine, in areas that include IT, project management, and sales (Sullivan & Rees 2008). It is being used increasingly for interviewing, for example by a police force interviewing vulnerable witnesses in order to avoid leading the witness<sup>ii</sup>, and has also begun to receive media attention<sup>iii</sup>.

Academic interest to date is principally in relation to teaching and learning. For example, 'Clean Language' has been used at the Open University in course materials developed by Dr John Martin<sup>iv</sup>; by the Centre for Excellence in Teaching and Learning at Liverpool John Moores University<sup>v</sup>; and in the University of Surrey's MBA<sup>vi</sup>. However, this application of 'Clean Language' to research represents an innovation.

### ***DEVELOPING (THE CURRENT PERCEPTION)***

#### **ATTRIBUTES**

- And is there anything else about X?
- And what kind of X is that X?

#### **LOCATION**

- And where/whereabouts is X?

#### **RELATIONSHIP**

- And is there a relationship between X and Y?
- And when Y, what happens to X?

#### **METAPHOR**

- And that's X like what?

### ***MOVING TIME***

#### **BEFORE**

- And what happens just before X?

#### **AFTER**

- And then what happens/what happens next?

#### **SOURCE**

- And where does/could X come from?

### ***INTENTION***

#### **DESIRED OUTCOME**

- And what would X like to have happen?

#### **NECESSARY CONDITIONS**

- And what needs to happen?

**Table 1: Eleven Basic Clean Language Questions** (source: <http://www.cleanlanguage.co.uk/>, accessed 7<sup>th</sup> March 2011)

The methodology for eliciting metaphor landscapes devised by David Grove not only uses the technique of 'Clean Language' but also facilitates the interviewee (or client) to 'self-model', as Lawley and Tompkins have called it. In other words, the client is enabled to identify and explore the structure of their own

inner world, and is empowered both through gaining increased knowledge of their 'landscape' and through being supported to attempt changes.

'Symbolic modelling' is therefore the term given by Lawley and Tompkins to this whole process of using 'Clean Language' to question an interviewee about their metaphors, and then using the information gained to construct a model. As its name suggests, modelling involves constructing a mental model or representation of someone's experience<sup>vii</sup>. This requires the interviewer to maintain an unusual perspective, a key aspect of which is that the interviewer temporarily suspends their own model, landscape and perspectives, and accepts that the conversation will be conducted *solely* in terms of the interviewee's emerging (metaphor) landscape. The interviewer's responsibility is to track the model that the client is exploring in order to decide where to direct the interviewee's attention. It is fundamental to the practice that the client holds responsibility for deciding when and whether to attempt change.

The approach that symbolic modelling takes towards metaphor is congruent with, and has become informed by, the philosophy of embodied mind, the core principles of which (Lakoff & Johnson 1999:3) are:

- 'The mind is inherently embodied.
- Thought is mostly unconscious.
- Abstract concepts are largely metaphorical'.

Lakoff and Johnson have put forward the philosophical view that our conceptions of the world are fundamentally metaphorical, and that 'metaphorical thought is unavoidable, ubiquitous, and mostly unconscious' (Lakoff & Johnson 2003:272). One challenge to this philosophy is that while the metaphorical contents of language are evident, this does not necessarily mean that people think metaphorically. However, recent work in the field of psychological science (Willems, Hagoort, & Casasanto 2010); (Jostmann, Lakens, & Schubert 2009); (IJzerman & Semin 2009) is considered to be providing this empirical evidence.

## Phenomenology

This paper is concerned with the application of symbolic modelling as a research methodology, applied as a form of phenomenological interviewing.

Phenomenology is a well-established approach in qualitative research (Giorgi 1985), (Moustakas 1994). Founded by Edmund Husserl, phenomenology 'is directed at gaining an in-depth understanding of the nature and meaning of everyday experience' (Gibson & Hanes 2003:182). The philosophy and nature of phenomenology are described in fuller detail by Gibson and Hanes (2003), who emphasise the contribution that phenomenology has to make to research and practice in human resource development (HRD), and by Conklin (2007), who makes a similar case for management inquiry. Kupers (2008) advocates a phenomenological approach to the analysis of organizational learning, and contemporary examples of phenomenology in organizational research include Gallagher *et al.* (2007) and Heil (2008). Varieties of phenomenology relevant to HRD also include interpretative phenomenological analysis (IPA) (Smith 2008), which has arisen mainly in health studies and is now being applied in organizational contexts (Cropley & Millward 2009); and relational phenomenology (Finlay 2002).

Despite a long tradition of phenomenological research, Gibson and Hanes (2003:198) acknowledge that it has no prescribed method. Giorgi (1985:25) ascribes the lack of a clear methodology for such research to the notion that phenomenology itself is an emergent knowledge system: 'Neither psychological phenomenology nor psychology as a human science is as yet a well-founded, fully mature discipline; both are only in the process of coming into being'. Conklin (2007) has posed challenges to the use of phenomenological methods in business research, including questions about reflexivity (Alvesson, Hardy, & Harley 2008)<sup>viii</sup> and the validity of Husserl's transcendental approach. These include:

- The tacit use of the authority of the phenomenological researcher to decide what is important or relevant in an interviewee's account;

- The argument that the researcher creates, and does not just record, meaning
- The difficulty of achieving epoche, whereby 'a researcher attempts to put in abeyance presuppositions and prejudices she may carry with her into the field.' (Conklin 2007:277)

This suggests that confidence in phenomenology could be enhanced by greater rigour and transparency in arriving at interpretations of other people's subjective worlds. Language, which is the usual medium through which phenomenological data are accessed via research interviews, is the focus for the enhancements explored in this paper.

### **Problems of language in phenomenological interviewing**

According to King ( 2004:11), in a review of interviewing methods in organizational research, 'the interview remains the most common method of data gathering in qualitative research', and 'the goal of any qualitative research interview is... to see the research topic from the perspective of the interviewee'. King acknowledges three main epistemological stances in qualitative methodologies; realist, phenomenological and social constructionist.

Qualitative interviews inevitably utilise language, and the centrality of questions to phenomenological research is underlined by Gibson and Hanes ( 2003:190), who say that 'because the goal of phenomenological research is to allow the phenomenon under investigation to reveal itself, questioning in the interview is of utmost importance'. Yet the role and significance of language in designing questions gathering phenomenological accounts receives relatively little attention (Tosey & Mathison 2010). Despite an extensive literature on research interviewing, it can be argued that there is a lack of sophistication in the awareness and use of language. For example, Kvale's text on interviewing offers only a rudimentary categorisation of questions (Kvale 1996:133-5). From the perspective of symbolic modelling, phenomenological methods are prone to being imprecise in both in data gathering and in the interpretation of transcripts.

Specifically, the propensity for researchers to introduce their own metaphors at both stages is under-acknowledged in research literature, and may pose significant threats to the validity of such work.

For example, Conklin's own paper (2007:286) lists the interview questions he used in his study of the experience of finding a 'calling'. These provide several clear examples of the inclusion of the researcher's metaphors (as viewed by Lakoff and Johnson) in the questions (see Table 2).

1. What compelled you to get involved in this work? Why do you do this?
2. What is the best thing about being involved in this work?
3. What are your hopes for this place, the world, the future?
4. What gives you hope?
5. What do you imagine the future to be? What is the image you carry around that drives your actions today?
6. What are your highest hopes for the work that you are doing?
7. Who else is involved?
8. What is the nature of the relationships that you have with the others who are involved? Who are they and how did you happen to come into contact with them?
9. How are you different from being involved in this work and with these other people?
10. Links to ecology, fundraising, relationships, politics. What roles have these topics played in your work? How do you manage these organizational realities and keep a keen eye on your mission or vision?

**Table 2: Interview questions as used by Conklin (2007) with selected metaphors underlined**

In order to give a more detailed illustration of these problems, a study by Berger (2004) re-analyses interviews with mature students on a master's program at George Mason University in order to probe the nature of personal transformations experienced by these students as a result of taking the programme.

Berger's study is chosen because it has the merit of including substantial interviewee data in the body of the article. In many instances of phenomenological research it is much more difficult to determine whether

metaphors originate in the researcher or the participants. In our view this is an important way in which phenomenological research can lack transparency, and is therefore a source of concern about validity.

The following excerpts from Berger (2004) relate to one of these students, Kathleen, 'an articulate executive for whom stability has been the norm. A white woman in her mid-50's, she is at the height of her career in the government. Then... with a change of administration she is unexpectedly asked to step down from the influential position she has had for many years.'

The researcher asks the following question (I have italicised the more obvious metaphors used by the interviewer and by Kathleen):

I ask her whether she wishes she were in a different *place in her life*... (using the metaphor 'place in her life' would be an example of 'non-Clean' practice in questioning *unless* Kathleen has already introduced this term).

Kathleen replies as follows:

No, I think this is the *journey*. And I could stay in this [uncertain space], I think, forever.... I don't know what to say, it *just feels like it will emerge*. But no, where I am right now feels very much like – it doesn't feel like a *hiatus*. It feels like it is the *journey* and that work will emerge from this place.

Berger comments in the article:

In this excerpt, it is clear that Kathleen is *on the edge* of her knowing. She *stumbles, stammers, circles back*... After admitting that she doesn't know, Kathleen seems more *comfortable*... Perhaps she *finds some footing* within the *slippery place* of her own uncertainty.

From a 'Clean Language' perspective, the metaphor used by Berger look entirely extraneous to Kathleen. Indeed, the divergence from Kathleen's words, and her

world, is striking. Both the 'inner landscape' itself and the quality of movement within it are re-interpreted to such a degree by the researcher, I suggest, as to risk misrepresenting the interviewee significantly.

In particular it is notable the metaphor of an 'edge' (of knowing) is mentioned no less than *one hundred and four times* in Berger's article; not once does this metaphor appear in the interviewee data cited in the article. This supports the desirability of distinguishing clearly between metaphors introduced by a researcher as an interpretive device, and those that originate in, belong to, and faithfully represent, interviewees' subjective worlds.

### **The work-life balance project**

In order to explore the potential of symbolic modelling as a research method the author led an empirical project in collaboration with practitioners that explored managers' experiences of 'work-life balance' (WLB). The project aimed to test symbolic modelling *in action*, as a research method that offers refined techniques for exploring individuals' inner worlds through metaphor. It aimed to elicit the naturally occurring metaphors of a small sample of participants, relating to the way they experienced work-life balance.

Work-life balance was chosen as a focus for further research because it is a subject of contemporary relevance to employers, employees and HR researchers. It was also of interest in relation to symbolic modelling because recent academic research has pinpointed and questioned the metaphor of 'balance' which is embedded in the WLB concept (Cohen, Duberley, & Musson 2009); (Roberts 2008). For example, the concept pre-supposes that:

- people divide their experience into these two categories, 'work' and 'life'
- these two categories are related by an experience analogous to 'balance'

- the notion of balance implies that 'work' and 'life' to operate in some way to counterbalance, stabilize, compensate for, even out or offset each other.

Our project therefore aimed to question these presuppositions. While Cohen *et al* and Roberts pinpoint and question the metaphor of 'balance' which is embedded in the wider WLB concept, neither has taken as systematic an approach to the exploration of naturally occurring metaphor as that which is offered by symbolic modelling. Cohen *et al* used an autoethnographic approach to question (appropriately) the central metaphor of 'work life balance', yet they import metaphors such as 'spheres' (of work and home) (Cohen, Duberley, & Musson 2009:230), which symbolic modelling would certainly resist.

Such an overtly metaphorical research topic is far from 'clean', and carries with it a number of challenges and risks. We chose to investigate WLB in part because it would entail dealing with these interesting challenges, rather than seeking to eliminate such complexity. The first challenge is the possibility that interviewees could be influenced by the very nature of the question, and/or that the research could be biased in the direction of the two categories of 'work' and 'life', and the metaphor of 'balance'. A second challenge relates to the complexity of the research question. WLB is a more difficult subject matter to explore than it might at first appear, requiring interviewees to have at least some perception of 'work' and its counterpart ('life'), together with some means of evaluating or assessing the relationship between the two. The task becomes even more complex if the respondent experiences only limited ownership of the 'WLB' metaphor.

These challenges became immediately apparent during the face-to-face interviews when, in response to the opening question, 'When your work-life balance is at its best, that's like what?'<sup>ix</sup> some of the interviewees commented directly, or by implication, that they were construing the world differently:

It's [an] interesting concept isn't it and I think for me it's a statement that came out – I first became aware of [it] a few years ago, I never used to see my life as a kind of a balance between work or life personally... I just didn't see it as an either-or. (Interviewee E)

Interviewee A's response was to translate the opening research question into their own words:

So in work-life balance I - presume you're - when I'm happiest at work and happiest at home, is that what you're saying?

Before the study began, we surmised that care and skill would be needed to elicit interviewees' self-perceptions and to maintain a focus on the crucial concept of 'balance' (the metaphor that notionally describes the relationship between work and life). In the event, these tasks required complex mental processing on the part of interviewees, and skill on the part of the interviewer.

## **Method**

For the purposes of this small-scale study, the interview sample was deliberately limited to six participants. In order to provide a reasonably uniform set of participants we decided to seek a convenience sample of mid-career managers (aged 40-50, of both genders) in fulltime employment.

Participants were drawn from contacts of the Clean Change Company and were recruited by the project manager from three different UK companies. The project was explained in writing and the voluntary, informed, written consent of all research participants was obtained. Their identities and those of their employers have been anonymised in this report. Interviews were set up by phone or email contact. All the research participants were invited to ask questions in advance of the interview, although none took up this option.

None of the managers was trained in 'Clean Language', nor were they primed about the practice at any stage. For example, we could have provided some examples of metaphors for WLB, and asked the interviewees in advance of the interview to consider their metaphors for WLB. We chose not to do this so that the interviews would provide data on how those with no special preparation or experience respond to this form of interviewing.

Face-to-face interviews were carried out in participants' workplaces in May and June 2010. Approximately two weeks after that first set of interviews, follow-up interviews were carried out by phone or Skype. An interviewer trained in symbolic modeling elicited their individual 'metaphor landscapes'. Participants were invited to explore their experiences and metaphors of WLB at its best and not at its best; interviews were video and audio-recorded in order to capture both the verbal and non-verbal detail of the research method in action. Additionally, each respondent was asked to produce a drawing of her or his metaphors after the first interview; this is a standard protocol in symbolic modelling.

A follow-up interview with each manager was conducted by the same interviewer to gather further detail and to ask participants what it was like to be interviewed using this method. The follow-up interviews had two aims: 1) to capture interviewees' reflections on the initial interview, together with their perceptions of the consequences and benefits or disbenefits of the process; and 2) to gather more details about interviewees' main metaphors.

All interviews were recorded, transcribed and analysed. A central feature of both interviews and analysis was to focus exclusively on each interviewee's metaphors, and to avoid introducing the researchers' metaphors at either stage. The transcriptions were marked-up by the interviewer such that the source of each word (ie whether it was from a participant or the interviewer) could be easily identified.

The interviewer then carried out an initial analysis of data gathered from each face-to-face interview, highlighting key metaphors and themes and, in particular,

the distinctions between WLB at its best and not best. Verbatim quotations taken from each interview were included to support this analysis.

In a final step, an expert (one of the originators of symbolic modelling) was commissioned to check and validate both the accuracy of the transcript analyses, ensuring that they were faithful to interviewees' descriptions, and the overall integrity of the interview process. For this study to meet its objectives, it was important to ensure that interviews were authentic examples of symbolic modelling and its questioning techniques. In the judgement of the expert analyst, the face-to-face interviews constituted an authentic application of symbolic modeling, both at a 'micro' level (questioning technique, staying 'Clean') and as a modelling process. The interviewer remained faithful to the techniques and indeed has set a benchmark that any future research using this method could seek to emulate.

The analysis yielded a unique metaphor landscape for each manager. A key finding is that, although the 'work-life balance' metaphor is widespread, not one of the interviewees' main metaphors overtly involved 'a balance'. However, a number of their metaphors implied some form of *balancing*, for example 'juggling', 'surfing', or being in 'equality'. The follow-up interviews revealed that all of the interviewees had remembered their main metaphors, with some describing practical benefit and changes they had made after being facilitated to explore their metaphor landscapes.

### **Participants' metaphor landscapes**

In the presentations of data that follow, even where summarized, the interviewees' own words appear in quotation marks. Table 3 summaries the participant's metaphor landscapes, using their own words. For the purposes of this paper I concentrate on these metaphors and have not supplied biographical data about the participants.

Participant	Core theme	Detail
A	<i>'it's like a circle'</i>	A's theme is one of a 'happy' cycle of 9 to 5 division between work and home. 'You would know what you're doing from day to day, you'd come to work, you'd do your job well, you'd go home and you have no stress, you have no strain [...] then you would carry out everything you planned to do that evening [...] for some quality time with the family.' WLB at its best it is 'like a circle' made of two parts ('work life' and 'home life'). Ideally the two come together, touch, and there is a 'fragile join' between them. When the circle becomes 'disjointed' there are 'problems'.
B	<i>'Going up a mountain dodging boulders'</i>	WLB at its best is like 'doing a particularly good job at juggling', like 'riding on the crest of a wave [...] you're on top of everything [...] you're on a high, I suppose [...] a natural high.' 'Riding' is like 'surfing', being 'on the surfboard' [with] 'perfect balance and [...] on your feet.' This is short lived and for the most part WLB is like 'going up a mountain' while 'having to dodge boulders', where previously the boulders were balls to juggle. When WLB is not at its best, stress levels go up and there are more and heavier boulders coming down the mountain and more chance of getting crushed. WLB is at its best when it is not only like 'riding the crest of the wave', but also like 'making good progress up the mountain', keeping going, 'managing to dodge the boulders' – 'but you're not at the top'. Some 'being stressed' and 'feeling time pressure' is required for good WLB, making it 'all such a fine balance to find'.
C	<i>'Mental separation'</i>	When 'Time to do things properly' exists at work and at home then there is WLB. When it does not exist then there is 'thinking about things at home' when at work and 'thinking of things at work' when at home. 'Time to do things properly' at work means 'Clearing all of the things off the tick list.' Once all items are ticked off there is 'kind of icing on the cake [...] stepping back and looking at the big picture'. At home there is no tick list and there is 'being supportive, being there and seeing [the] kids grow up and nice things happen.' When WLB is not at its best the list is not cleared. At home there is worrying about what

		still needs to be done with the list 'nagging at the back of your mind'.
D	<i>'A split with a Friday evening switch'</i>	'Weekends are for family, weeks are for work [...] that's the sort of split I do'. When WLB is at its best the two do not interfere, there is no blur. 'Week' is characterised by a 'logical me' who is 'structured' and 'intense'; 'The pace at which I do everything in the week is boom-boom-boom-boom-boom'. This pace is set by D and it is one that 'comes from my ambition'. Batteries supply energy that is required for the week and these are 'recharged' at 'weekend'. Weekends are characterised by 'me' that is 'loosey-goosey [...] much more just sort of going with the flow'. This is also a more social 'me'. The pace at the weekend 'just drops right down', with its own energy. The switch between 'week' and 'weekend' happens on a Friday; 'a sort of Friday evening switch', which is also the 'switch that comes back on [...] with the alarm clock on Monday morning'. The weekend and week are like 'the Yin and Yang' – 'one of them allows me to do the other one'. Yin and Yang 'support each other and keep different parts of me happy.' The weekend 'satisfies a whole basket of needs', while the week 'the whole basket of other needs'. When WLB is not at its best 'the distinction between the week and weekend' becomes 'blurred'. Weekends become more structured and more deadline driven and 'it just hits you'.
E	<i>'A deal'</i>	'For me the concept of work-life balance is that it's a deal [...] I've got to have a routine around things as long as there's a deal that actually if I do do the extra, there is pay-back from time to time when I want it.' The deal involves flexibility beyond what's contractual and the details of the deal can change from organisation to organisation. When WLB is not at its best there is a master-servant relationship between employer and employee. Then there is no deal: people feel exploited, like cannon fodder.
F	<i>'Juggling'</i>	F's theme is one of matching external demands and expectations to 'who I am as a person'. When WLB is at its best it is like juggling 'with ease', with a sense of balance, feeling energised. 'You're holding quite a few

		<p>things at the same time' but they are within reach and 'you are catching them'. 'You're tossing balls up into the air and then they're almost falling back into your hands without you having to strain and struggle.' It has a playful feel about it. Things are thrown at F and 'I have to match them to what's important to me.' 'You're acting out of that place where you feel centred and making conscious choices with ease.' Centred is like a spinning top, spinning on its centre, spinning with ease.' Everybody admires [it] because it's beautiful.' The spinning top is a toy that 'can take you into a whole world of discovery and creativity and imagination'. When WLB is not at its best 'there are [...] several tops [...] they're all spinning but they [...] need attention at different times and then it's no longer playful because you're having to run from one to the other to keep them spinning'. In this metaphoric system, F's choices determine whether WLB is working well or not (one top or several tops). 'If I am being true to who I am, there isn't a difference then between how I'm acting at home or at work.'</p>
--	--	---

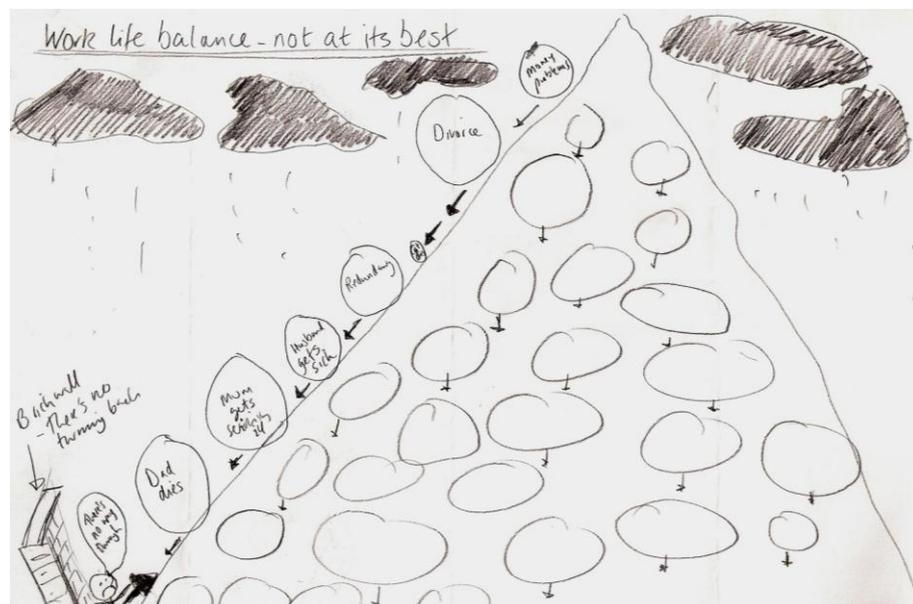
**Table 3: Interviewees' metaphors of work-life balance**

For participant B, for example, WLB at its best is like 'doing a particularly good job at juggling', like 'riding on the crest of a wave [...] you're on top of everything [...] you're on a high, I suppose [...] a natural high.' This is short lived and for the most part WLB is like 'going up a mountain' while 'having to dodge boulders', where previously the boulders were balls to juggle. When WLB is not at its best, stress levels go up and there are more and heavier boulders coming down the mountain and more chance of getting crushed.

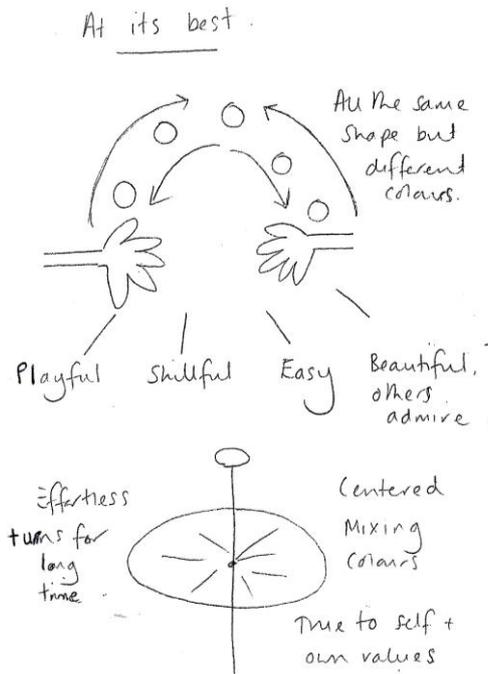
Most participants contrasted work-life balance when it was working and when it was not working. These contrasts are also illustrated graphically by the pictures they draw. For example, figures 1 and 2 are participant B's drawings of 'riding the crest of a wave' and 'going up a hill dodging boulders'. Figures 3 and 4 are participant F's drawings of WLB at its best ('juggling with ease') compared with at its worst ('lots of spinning tops').



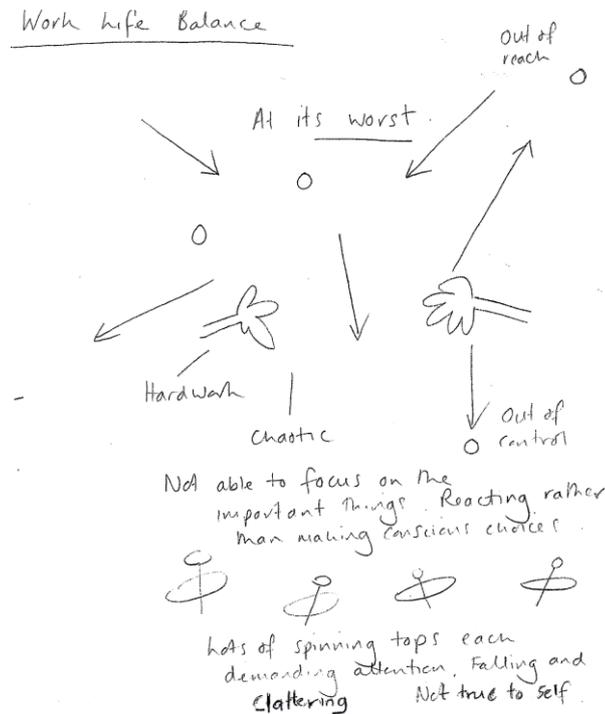
**Figure 1: Interviewee B (Work life balance at its best) - Riding the crest of a wave**



**Figure 2: Interviewee B (Work life balance not at its best) - Going up a hill dodging boulders**



**Figure 3: Interviewee F (Work life balance at its best) - Juggling with ease, feeling centred like a spinning top**



**Figure 4: Interviewee F (Work-life balance not at its best) – lots of spinning tops, not playful, having to run from one to the other**

Although there was no explicit intention to identify how the interviewees *assessed* their WLB at the time of the interview, the majority of interviewees did comment on their current situation with most reporting that they were currently far from at their best ('a million miles away', said one in their follow-up interview).

## **Findings**

### ***Patterns of response***

A key finding from these six interviews is that, despite the apparent popularity of the 'work-life balance' metaphor in common parlance, not one of our interviewees' main metaphors overtly involved 'a balance' (participant B does refer to 'a fine balance').

Nevertheless a number of their metaphors did imply some form of *balancing*, for example while 'juggling' (Interviewees B and F), 'surfing' (Interviewee B), or in 'equality' (Interviewee E). The more the interviews progressed, the less 'balance' was actively involved in participants' descriptions unless re-introduced by the interviewer. Given the central significance of 'balancing' (however this is represented) in this study, future research into WLB could pay more explicit attention to the dynamics of 'balancing'.

All the interviewees identified a number of metaphors and spent a considerable portion of the interview describing and examining these metaphors. A metaphor of 'separation/compartmentalisation' was used by five of the six managers and was a recurring theme, with four of the six interviewees using the metaphor of a 'split'. For some, a separation was part of WLB at its best ('the idea of [...] the Friday night switch [...] the question on "how do you move from one to the other?"' - Interviewee D), while for others, it was the absence of a split that indicated WLB at its best. Thus for Interviewee A, WLB is 'like a circle' made

of two parts, 'work life' and 'home life', and there is a 'fragile join' between them; 'If you like the circle's completed and [...] it's just going round and around and around [...] it comes together and – and that creates your WLB and that is always joined.' (Interviewee A)

The metaphor of a 'circle' – vicious, virtuous or negative – was mentioned in three of the face-to-face interviews (Interviewees A, C and E) and by another manager in the follow-up (Interviewee F). While it was a central metaphor for only one manager, it was commonly used to express both the interconnectedness of several factors, and that the degree of WLB could vary by becoming better or worse. This feature of experience may indicate that, consciously or otherwise, these managers were thinking somewhat systemically about their situation.

Because of this, future research could address the question of how managers *scaled*<sup>x</sup> their sense of WLB; in other words, by what means were they able to decide that it was getting better or worse (both day-by-day and over longer time periods), and how did they know when it had crossed a threshold from being at its best to being no longer at its best – or vice versa.

### ***Modelling a metaphor landscape***

A principal claim for symbolic modeling is that an interviewee can be encouraged to describe their experience in a way that gives some insight into how his or her metaphor landscape works as a whole, as a coherent system. The project appears to have substantiated this claim, in that all of the interviews contain sufficient information to construct an understanding of an individual's metaphoric system.

In symbolic modelling, the notion of a system refers to the fact that eliciting a model successfully requires information about both the *elements* of someone's experience and, crucially, the *relationship* between those components, in particular the sequential, causal and contingent relationships. In the context of this project, our hypothesis was that interviewees could be facilitated to self-

model their personal metaphors of WLB, in the process describing their experience in a way that demonstrated how the elements and events fit together. If successful, such an approach could greatly extend existing understanding of how individuals construe and experience WLB.

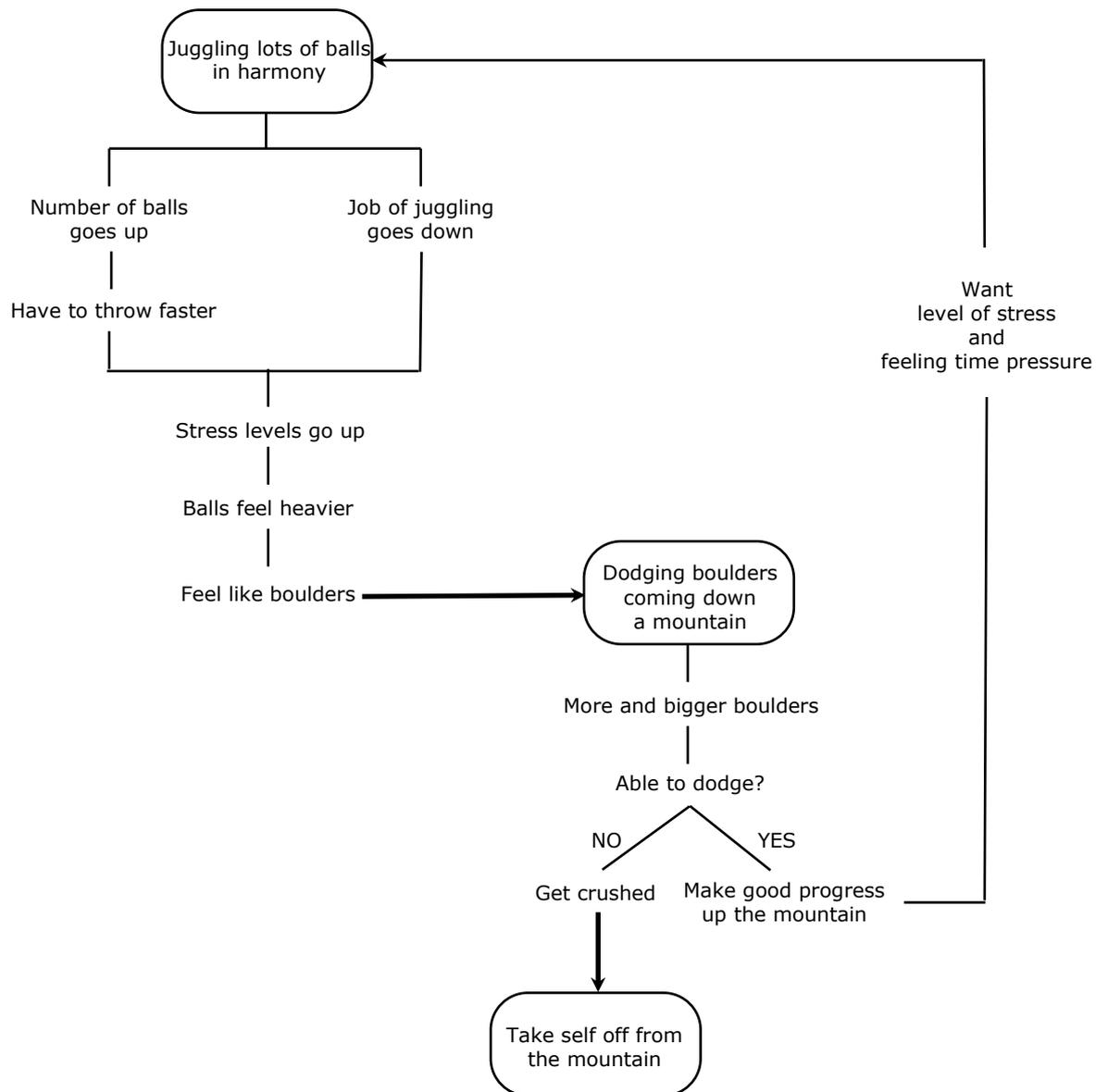
An example of how a prototype model of a metaphoric system can be derived from the interview data (for Interviewee B) is shown below (Figure 5). With reference to this prototype, we note that as well as 'juggling lots of tennis balls in harmony', B gave another metaphor that summed up good WLB; that is, like 'riding the crest of a wave'. The latter metaphor is not shown in the model because it seems parallel to (isomorphic with) B's metaphor of 'juggling'; 'riding the crest of a wave' can therefore be regarded as an alternative to the 'juggling' metaphor, and not as an additional element of the model.

This process of extracting a model from the data parallels to some extent the phenomenological process of 'horizontalising' and producing textural and structural descriptions for an individual interviewee (Conklin 2007:278).

### ***What was it like for participants to be interviewed using this method?***

The follow-up interviews provided useful evidence of the interviewees' experience of symbolic modeling as an interview method. All of the interviewees had remembered their main metaphors, with some deriving real benefit from the experience of exploring, describing and drawing their metaphor landscapes. The majority of participants stated that they had enjoyed the interviews and gained valuable insights into their personal metaphors relating to WLB.

You had to think about it quite deeply [...] [It was] quite thought-provoking. [...] it definitely felt different from how you can normally be interviewed. (Interviewee C)



**Figure 5: Prototype model of how Interviewee B's metaphor of 'WLB' works over time.**

Some interviewees reported that they had had no difficulty at all with the approach; others who did have some difficulty stated that they found it easier to answer the questions as the interview progressed.

Some reported that following the initial interview they had spent time considering their current WLB, with a growing awareness of it. In some cases

participants had taken a decision to make changes, even if the follow-up interview was too soon after the initial interview for them to have made the changes yet.

I found it quite therapeutic [...] I actually thought it [...] benefited me in some way. [...] I already sort of knew [...] it wasn't the perfect circle [...] I think it's made me realize more about my own personal life and maybe I – I need to – to sort out my own personal life [...] talking to someone has made me [...] accept it more, yes, which then allows me to [...] make a decision - make changes. (Interviewee A)

So I can see that I'll be able to get things back in balance and I'll be able to you know, spend a bit more time looking after myself or whatever, you know, and not just worrying about other people [...] the general realisation that [...] I did seem to focus on boulders coming down mountains rather than surfing [*laughs*] you realise [...] work isn't everything [*laughs*] you know, senior people will just [...] keep driving you hard until you're in a mess if you're not careful [...] so I'm not going to let that happen.  
(Interviewee B)

Other participants reported that they had already made changes in their life to redress their current WLB as a result of the initial interview.

[...] the few weekends [...] since then have been really good [...] I have the conversation with my wife [...] about the fact that you know, Friday night is my switch and it's quite useful [...] by getting the difference between the weekends and the weeks, not just means that I enjoy my weekends more, it also means that I'm in a better state to - keep going all through the week.  
(Interviewee D)

There are [...] times when I thought, 'Actually yes it is working, and now I realise that it's – it's not working' [...] I've been able to [...] distance myself from the situation, [...] stand back, think about what's happening, which perhaps I might not have done before [...] it's actually just increased

my knowledge that I can make changes [...] a sense that it is within my capacity to make the changes necessary to – to make it work rather than feeling that you're helpless. (Interviewee F)

Personal change, which is normally a goal of symbolic modelling in a coaching or therapeutic context, was not pursued intentionally within this research study. Such changes may be an interesting and potentially important by-product of a research interviews using this method.

### **Implications for phenomenological interviewing**

While academic researchers might believe that they already practise 'clean' interviewing, for example through eliciting open-ended feedback, noting metaphors, or including verbatim quotes to support analysis, symbolic modelling and the intentional use of Clean Language enables further refinement.

Like phenomenology, symbolic modeling can discover the 'structures, logic and interrelationships that are contained in the phenomena under investigation' (Conklin 2007:277) in a systematic way. The elements identified by symbolic modeling are directly comparable to those which, according to Conklin ( 2007:277-8), are of interest to phenomenology:

- Sensory experience
- Space/time references
- The meanings
- Perceiver (awareness of having the experience)
- The relationship between the object and the observer
- Thickness and visceral quality of the description

First, this project has shown how symbolic modelling can employ the techniques of 'Clean Language' to avoid introducing the researcher's metaphors into the interview – in contrast to Conklin's own phenomenological questions as shown

above. This is significant, in particular, for the phenomenological researcher's attempts to achieve *epoche*. In other words, 'Clean Language' provides a discipline that guards against the 'presuppositions and prejudices' (2007:277) embedded in the interviewer's metaphors entering the interview. The follow-up interviews, which (intentionally) mixed two kinds of information gathering (reflection on the interview process, and further investigation of an individual's metaphors), yielded information that, while still of interest for our study, was noticeably less 'Clean'.

Furthermore, symbolic modelling operates through a public, transparent process. As demonstrated in the WLB project, this allows for challenge and validation through expert review and can enhance the consistency and reliability of findings. For example, the transcripts do show some variation in the way that both the face-to-face and follow-up interviews were opened up for discussion, resulting in the unintended introduction of unnecessary metaphors, for example, 'focusing', in 'spend [...] time focusing on work/life balance'. As already discussed, departures – however slight – from a consistently 'Clean Language' approach can affect the response. This point is especially pertinent given the overtly metaphoric properties of the research question and its potential for biasing interviewees' responses.

Among the critiques of reflexivity raised by Alvesson *et al.* (2008) and considered by Conklin (2007:272) is that of polyphony. According to Conklin (2007:282), this can lead to a 'diminution of the researcher's self (which) has the paradoxical effect of holding up the researcher in a tacit celebration of his or her ostensibly "wise and superior" intellect in determining what is worthy of inclusion'. While it is not claimed that symbolic modeling avoids this altogether, as a method it places the participant's metaphor(s) rather than the researcher's self as the central criterion of relevance. The interviewer/researcher's influence is still present, though is most apparent in the selection of ('clean') questions during the interview, which direct the interviewee's attention.

This study has not proceeded through the stages of phenomenological interpretation that lead to composite descriptions, imaginative variation and synthesis (Conklin 2007:279-80). Indeed symbolic modelling is cautious about aggregating different individual metaphors. While the study reported above has identified some commonalities in interviewees' metaphors, there appears to be little justification within these data for developing any composite view. From the perspective of symbolic modelling one would also question the transcendentalism of Husserl's position, including the view that experience can be 'timeless' (Conklin 2007:280). What the study can claim to have provided is a 'clean' foundation for these further stages of phenomenological interpretation. It has also demonstrated the way in which the elements of a metaphor landscape can be combined into a 'model' – the logic of which, once again, is dictated by the interviewee's experience.

Eliciting a person's way of assessing a concept such as WLB is not a job for a novice. The quality of information obtained in this study is directly related to the competence of the interviewer. For example, when exploring participants' perceptions of 'balance', sometimes the interviewer requires patience and persistence in order for an overt metaphor to emerge. It was not until two-thirds of the way through the interview that Interviewee A produced their 'completed or joined circle' metaphor. On the other hand, F came up with 'juggling' at the very beginning of the interview. This variation is common and requires the interviewer to ask questions in a way that paces the interviewees' awareness of the metaphoric aspects of their experience. Interviewees who tend to give specific examples or abstract descriptions may take a while before they connect with a metaphor, but once they do it can become an important source of self-knowledge.

Finally, the expert analyst pointed out that symbolic modelling was being used in this project in four distinct ways, in order of increasing complexity, as shown in Table 4. 'Clean Language' principles also apply to the analysis of transcripts at any of the levels shown in Table 3, such that the analysis stays faithful to the interviewee's metaphors, with minimal interpretation of the interviewee's subjective world.

Level	Description
1. A questioning technique	Making use of 'Clean Language' questions as technical elements within any interview method and context, in order to minimise the introduction of the researcher's metaphors and constructs.
2. A method of eliciting interviewee-generated metaphors	Using 'Clean Language' questions tactically within an interview, in order to elicit metaphors and metaphoric material.
3. A means of 'in the moment' modelling by the interviewer (during the interview) of an individual's metaphor landscapes	Using symbolic modelling to elicit and map out the interviewee's metaphor landscape, emphasising connections and relationships between metaphors as well as the metaphors themselves.
4. A coherent research strategy that guides the researcher before, during and after the interview	Using symbolic modelling both as a method and in principle to guide the entire research process including formulating the research question and reviewing features and patterns of the total data.

**Table 4: Progressive levels of symbolic modelling in interview-based research**

These distinctions underline the importance in future research of knowing which level of application is intended within any project. For example, at the most basic level a researcher could employ 'Clean Language' questions within a standard qualitative interview approach. Such questions could elicit interesting data, but without any intent on the part of the researcher to practice symbolic modeling. At the other extreme, symbolic modeling could inform the entire research strategy starting with the formulation of the research question itself.

## Conclusion

The study illustrates potential methodological enhancements that symbolic modelling and its questioning techniques can bring to phenomenological

interviewing and analysis in HRD research in order to address contemporary critique. Symbolic modelling can:

- Distinguish clearly between metaphors introduced by a researcher into their questions or as an interpretive device, and those that originate in, belong to, and faithfully represent, interviewees' subjective worlds. While the researcher still makes decisions about where to direct attention, the method increases confidence that the meaning being explored is that of the interviewee.
- Make the interviewee's metaphor the focal criterion for the relevance or significance of interviewee data.
- Provide explicit and systematic principles and techniques that can be shared and discussed by researchers, thereby increasing the transparency of the process of interpretation.

Researchers, including industry researchers such as market researchers as well as academic researchers, can incorporate symbolic modelling into their research practice in a variety of ways, on a spectrum from occasional use of the 'Clean Language' questions to overarching research design principles. Interviewees found the approach helpful and, either initially or as the interview progressed, comfortable. There was evidence that participants recalled the metaphors they had explored in the initial interviews, and some participants had made spontaneous changes as a result of the interviews.

The substantive results have implications for understanding of WLB, as well as for managers and human resource professionals who are dealing with work-life balance issues in the workplace:

- People have unique, dynamic and highly personal metaphors for their experience.
- While participants conveyed their sense of relationship between different domains of life in varying ways, these domains were not necessarily categorised as 'work' and 'life'.

- Participants were not necessarily seeking to achieve ‘balance’. The explicit metaphor of ‘balance’ appeared only rarely, even though many of the participants’ metaphors implied a notion of *balancing*.

Among implications for practice are that line managers, Human Resource managers and coaches seeking to develop WLB policies or to support individual employees with WLB issues can gain valuable insight through being aware of individuals’ metaphors and metaphor landscapes.

## References

- Alvesson, M., Hardy, C., & Harley, B. 2008, "Reflecting on Reflexivity: Reflexive Textual Practices in Organization and Management Theory", *Journal of Management Studies*, vol. 45, no. 3, pp. 480-501.
- Berger, J. G. 2004, "Dancing on the Threshold of Meaning: Recognising and Understanding the Growing Edge", *Journal of Transformative Education*, vol. 2, no. 4, pp. 336-351.
- Cohen, L., Duberley, J., & Musson, G. 2009, "Work-Life Balance?: An Autoethnographic Exploration of Everyday Home-Work Dynamics", *Journal of Management Inquiry*, vol. 18, no. 3, pp. 229-241.
- Conklin, T. A. 2007, "Method or Madness: Phenomenology as Knowledge Creator", *Journal of Management Inquiry*, vol. 16, no. 3, pp. 275-287.
- Cropley, M. & Millward, L. J. 2009, "How do individuals 'switch-off' from work during leisure? A qualitative description of the unwinding process in high and low ruminators", *Leisure Studies*, vol. 28, no. 3, pp. 333-347.
- Finlay, L. 2002, "Negotiating the swamp: the opportunity and challenge of reflexivity in research practice", *Qualitative Research*, vol. 2, pp. 209-230.
- Gallagher, S. J., Rocco, T. S., & Landorf, H. 2007, "A phenomenological study of spirituality and learning processes at work: Exploring the holistic theory of knowledge and learning", *Human Resource Development Quarterly*, vol. 18, no. 4, pp. 457-480.
- Gibson, S. & Hanes, L. A. 2003, "The Contribution of Phenomenology to HRD Research", *Human Resource Development Review*, vol. 2, no. 2, pp. 181-205.
- Gibson, S. K. 2004, "Being Mentored: The Experience of Women Faculty", *Journal of Career Development (Springer Science & Business Media B.V.)*, vol. 30, no. 3, pp. 173-188.
- Giorgi, A. 1985, *Phenomenology and Psychological Research* Duquesne University Press, Pittsburgh PA.
- Grove, D. J. & Panzer, B. I. 1991, *Resolving Traumatic Memories: Metaphors and Symbols in Psychotherapy* Irvington Publishers Inc., New York.
- Heil, D. 2008, "Strategic innovation and organisational identity: A hermeneutic phenomenological investigation", *Journal of General Management*, vol. 33, no. 4, pp. 1-12.
- IJzerman, H. & Semin, G. R. 2009, "The Thermometer of Social Relations", *Psychological Science*, vol. 20, no. 10, pp. 1214-1220.

Jostmann, N. B., Lakens, D. I., & Schubert, T. W. 2009, "Weight as an Embodiment of Importance", *Psychological Science*, vol. 20, no. 9, pp. 1169-1174.

King, N. 2004, "Using Interviews In Qualitative Research," in *Essential Guide to Qualitative Methods in Organizational Research*, C. Cassell & G. Symon, eds., Sage, London, pp. 11-22.

Kupers, W. 2008, "Embodied "inter-learning" - an integral phenomenology of learning in and by organizations", *Learning Organization*, vol. 15, no. 5, pp. 388-408.

Kvale, S. 1996, *Interviews: an introduction to qualitative research interviewing* Sage, London.

Lakoff, G. & Johnson, M. 1980, *Metaphors We Live By* University of Chicago Press, Chicago and London.

Lakoff, G. & Johnson, M. 1999, *Philosophy in the Flesh: the embodied mind and its challenge to Western thought* Basic Books, New York.

Lakoff, G. & Johnson, M. 2003, *Metaphors We Live By*, 2nd edn, University of Chicago Press, Chicago.

Lawley, J. & Tompkins, P. 2000, *Metaphors in Mind: transformation through symbolic modelling* The Developing Company Press, London.

Moustakas, C. 1994, *Phenomenological Research Methods* Sage, New Delhi, Thousand Oaks, CA.

Roberts, E. 2008, "Time and Work Life Balance: The Roles of 'Temporal Customization' and 'Life Temporality'", *Gender, Work & Organization*, vol. 15, no. 5, pp. 430-453.

Smith, J. A. 2008, *Qualitative Psychology: A Practical Guide to Research Methods*, 2nd edn, Sage, London.

Sullivan, W. & Rees, J. 2008, *Clean Language: revealing metaphors and opening minds* Crown House Publishing House, Carmarthen, Wales.

Tosey, P. & Mathison, J. 2010, "Exploring inner landscapes through psychophenomenology: the contribution of neuro-linguistic programming to innovations in researching first person experience", *Qualitative Research in Organizations and Management*, vol. 5, no. 1, pp. 63-82.

Willems, R. M., Hagoort, P., & Casasanto, D. 2010, "Body-Specific Representations of Action Verbs", *Psychological Science*, vol. 21, no. 1, pp. 67-74.

---

<sup>i</sup> <http://www.cleancchange.co.uk/cleanlanguage/2010/10/05/clean-change-case-studies/>, accessed 10<sup>th</sup> October 2010.

<sup>ii</sup> <http://www.trainingattentioninthecommunity.co.uk/police%20interviewing.pdf> accessed 10<sup>th</sup> October 2010.

<sup>iii</sup> 'The Healing Power of Positive Language', BBC news online 27 October 2009, <http://news.bbc.co.uk/1/hi/health/8326171.stm>, accessed 15<sup>th</sup> September 2010.

<sup>iv</sup> Video and transcripts: 'Metaphor and Imagery' available via the 'OU on iTunes U' at: <http://open.edu/itunes/>, accessed 27<sup>th</sup> September 2010.

<sup>v</sup> 'Modelling the curriculum through metaphors: One programme's approach' Sarah Nixon and Caitlin Walker.' [http://www.ljmu.ac.uk/ECL/ECL\\_docs/CETL\\_Journal\\_No2.pdf](http://www.ljmu.ac.uk/ECL/ECL_docs/CETL_Journal_No2.pdf), accessed 16<sup>th</sup> September 2010

<sup>vi</sup> Module in Strategic Change Management, co-ordinator Dr Paul Tosey.

<sup>vii</sup> This usage is derived from Neuro-Linguistic Programming (NLP), see Dilts (1998).

<sup>viii</sup> Conklin cites a 2004 conference paper by the same authors. The 2008 source cited here is a subsequent journal article produced by those authors.

<sup>ix</sup> The question 'When x is at its best, that's like what?' (and variations on this question) is commonly used by Clean Language modellers to elicit the metaphor for a person's ideal state or situation. It was developed by Clean facilitator Caitlin Walker.

<sup>x</sup> 'Scaling' refers to the way that people use scales to rank things in order to express relativeness. While a culture has many agreed scales – eg minutes and hours for the passing of time – individuals have their own unique metaphorical scales for other aspects of their lives. For example, two of many possible metaphors for scaling 'control of a situation' could be to assess the *amount* or the *level* of control the individual believes they have in a situation. Commonly a scale will have a threshold at either extreme, beyond which something different happens. See <http://www.cleanclanguage.co.uk/articles/articles/26/1/Big-Fish-in-a-Small-Pond-The-Importance-of-Scale/Page1.html>.