ORGANIZATIONAL CHANGE AS THE HERO’S JOURNEY WHITE PAPER
Excerpt from the upcoming book “Organizational Change as the Hero’s Journey”
BY DAVID ORANGE

INTRODUCTION

“The hero’s journey is a story of individual transformation, a change of identity. In embarking on the journey, we must leave the world of certainty. We must courageously journey to a strange place where there are a lot of risks and much is at stake, a place where there are new problems that require us to think in new ways.

Because there is much at stake, we must engage and resolve the problems before us. To do this successfully, we must surrender our present self—we must step outside our old paradigms. This venture outside of our current self will cause us to think differently. To continue our journey is to reinvent the self. It is then that our paradigms change and we experience an ‘expansion of consciousness.’ We begin to realign our self with our surrounding environment. Not only do we view the world differently, but we view it more effectively” (Quinn, 1996, pp. 45-46).

THE MODEL

The Organizational Hero’s Journey was created for future use with a potential client of ensemble actors and tested with a client, pro bono in October 2004. I served as the consultant and creator of the model.

The model serves as a guide for individuals, groups, teams, and organizations desiring a future state attained via the Organizational Hero’s Journey. The model also helps the client to live in and extend the metaphor of the Organizational Hero’s Journey throughout the change process. Borrowing from the work of Rebecca Chan Allen’s (2002) in her book Guiding Change Journeys, an interpretation of Joseph Campbell’s Hero With A Thousand Faces (1949), I identify seven stages in the Organizational Hero’s Journey: (1) Call, (2) Jump, (3) Trials, (4) Dissolution (5) Discovery (6) Integration (7) Application (see Table 1 on page 4).

The client experiences the Organizational Hero’s Journey as action-oriented, and self-directed. The model provides clients and their individual organizational members with an ongoing cycle of action, reflection, planning and application. This cycle focuses on behaviors, actions, feelings, perceptions, and group dynamics observed or experienced during stages in the change journey. This reflective cycle is visually depicted in “The Arena” (see Figure 1) offering an ongoing visual history of the client and its individual members—a visual history created by the client specifically for guidance in its change journey.

The model applies the following core conceptual frameworks and methodologies:

- Participative Inquiry (a form of action research)
- Generative Metaphors
- Outdoor/Adventure Education
- Experiential Learning
- Archetypal Psychology
The process spans the course of three days and offers the following core features, which I call metaphorical practices:

- Mythic Metaphorical Practices
- Normative Metaphorical Practices
- Mapping - A Metaphorical Practice
- Experiential Metaphorical Practices
- Visual Reflective Metaphorical Practices

**METAPHORS**

Metaphors invite us to see the world anew. Metaphors are more than literal assertions, they describe an external reality. They also help constitute that reality and prescribe how one should view and evaluate it. Metaphor is treated as a domain of awareness “beyond” what is given – an interaction between systems of language, thoughts and experiences, processing one experience in the world by directing attention to a seemingly unrelated experience. The familiar domain of the metaphor organizes perception of the less-familiar, selecting and emphasizing certain details, suggesting things that may not have been seen. This process produces a meaning larger than either of its subjects. Effective metaphors provoke new thought, excite us with novel perspectives, vibrate with multi-vocal meanings, and enable people to see the world with fresh perceptions not possible in any other way – contributing to sensmaking and organizational learning (Barrett & Cooperrider, 1990; Tsoukas, 1991).
THE ROLE OF METAPHORICAL PRACTICES IN THE ORGANIZATIONAL HERO’S JOURNEY

The object of our sensemaking and learning is our experiences. John Dewey (1938) defines experience as a transaction or interaction between the person and her/his internal and external environment. Life offers a continuous stream of ongoing events. Events with which we interact become experiences. However, all experiences are not equal. Experiences are routine, dramatic, traumatizing, joyous, etc.

The focus of my attention is experiences that provide the greatest opportunities for organizational sensemaking and learning for the client. The five metaphorical practices listed below are designed to influence the client’s “learning milieu,” and “intent.” Each of the succeeding sections addresses how the metaphorical practices influence intent and milieu.

Boud and Walker (1990) describe the learning milieu as “all those entities, human and material, which provide the context and events within which the learner operates...It is the learners’ engagement with the milieu which constitute the particular learning experience. The milieu becomes the context of learning by virtue of the learners entry into it” (p. 5). One of my roles as the consultant is to design and facilitate the learning milieu, using structured group activities and metaphorical practices.

“The other important element which the learner brings to the situation is learning intent. Intent can be regarded as a personal determination which provides a particular orientation within a given situation, a rationale for why the learner comes to the particular learning event. Intent is the foundation for self-directed learning; it prompts learners to take steps to achieve their goals. It involves a particular focus of consciousness, the direction of perception along particular lines. A particular intent can only be determined by reference learners themselves” (Boud & Walker, 1990, p. 3).

How the client or organizational members perceive the situation will determine their interaction with the learning milieu. In other words, through the use of metaphorical practices, I endeavor to have participants show up as their most present and authentic selves while in the learning milieu, thereby maximizing learning opportunities.

This section provides an explanation informing the five core metaphorical practices of this model:

1. Mythic Metaphorical Practices
2. Mapping – A Metaphorical Practice
3. Normative Metaphorical Practices
4. Experiential Metaphorical Practice
5. Visual Reflective Metaphorical Practices

The Organizational Hero’s Journey model’s metaphorical practices are an integrated set of common actions and activities that are expressed, conceptualized, and experienced metaphorically and that structure perception and behavior. These practices inform conscious and unconscious assumptions, beliefs and patterns resulting in organizational change, (Adapted from Marshak, 1996, p. 152).
Organizational Hero’s Journey

**MYTHIC METAPHORICAL PRACTICES**

Mythologist Joseph Campbell popularized myths in Bill Moyers television series, *The Power of Myth*. Jung (1968) states “myths are first and foremost psychic phenomena that reveal the nature of the soul” (p. 6). Campbell (1949) portrayed myth as emanating from the collective soul of humankind. His seminal book, *Hero with a Thousand Faces* (1949), is a comparative study of the hero myth from a cross-cultural perspective. *Hero with a Thousand Faces* is aptly named, because although diverse collective world cultures produce a thousand faces of the archetypal hero, they all tell the same basic story of the hero’s journey.

Organization Development Consultant Rebecca Chan Allen (2002) identifies eight stages in Campbell’s hero’s journey. A general comparison of Campbell’s hero’s journey and Allen’s (2002) eight stage “archetypal change journey” follows (p. 2) (see Table 1):

<table>
<thead>
<tr>
<th>Eight Stages</th>
<th>Campbell’s hero’s journey</th>
<th>Allen’s (2002) archetypal change journey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inertia</td>
<td>Status quo, stagnation, complacency in the realm</td>
<td>Organizational stagnation, being stuck, “mindlessly repeating an outmoded pattern of thinking and acting” (p. 52)</td>
</tr>
<tr>
<td>Call</td>
<td>The hero is called, impelled or pushed into journey</td>
<td>Loss of market share, customer dissatisfaction, new competition, new opportunities, “tried-and-true methods do not produce the expected results” (p. 65)</td>
</tr>
<tr>
<td>Jump</td>
<td>The hero decides to heed the call and go forth into the unknown</td>
<td>Organizational commitment to undergo a change initiative</td>
</tr>
<tr>
<td>Trials</td>
<td>The hero has to slay the dragon or monster (these could be internal demons)</td>
<td>“Organizations are tested physically, structurally, culturally, and emotionally in the trial cycle…Recognize this experience as the crucible of transformation” (p. 102)</td>
</tr>
<tr>
<td>Dissolution</td>
<td>A condition of transformation is a form of death, the letting go of the world, wealth, old ways of being and acting</td>
<td>Organizations let go of outmoded ways of thinking and acting, a form of death</td>
</tr>
<tr>
<td>Discovery</td>
<td>A boon, gift, or transformation is experienced or discovered by the hero</td>
<td>“An organization or person can perceive what was previously hidden from them…A new structure, a new culture, a new business, a new market is now realizable” (p. 148)</td>
</tr>
<tr>
<td>Integration</td>
<td>The hero returns to the world left behind, bringing the boon, gift, or transformative wisdom</td>
<td>“incorporating the gift of discovery…reconciling differences…sustaining the system…creating a new vision” (p. 168)</td>
</tr>
<tr>
<td>Application</td>
<td>Boon, gift, or transformative wisdom is integrated and adapted by the world resulting in transformation</td>
<td>Dissemination of insights and innovations gained from the smaller system to the larger system</td>
</tr>
</tbody>
</table>

Table 1. Comparison of Campbell's hero's journey and Allen's archetypal change journey.

Allen (2002) adapts Campbell’s (1949) cycle of the hero’s journey to explain and enact organizational change processes. I owe a debt of gratitude to Rebecca Chan Allen (2002) for her imaginative and original work in transforming Campbell’s (1949) hero’s journey into her archetypal change journey. Allen’s archetypal change journey greatly informs the Organizational
Hero’s Journey’s five metaphorical practices. I use seven of Allen’s eight-stages in all of my model’s metaphorical practices. Allen’s work demonstrates that organizational change as the hero’s journey offers a way of seeing into, understanding, and making sense of the change process.

**MAPPING – A METAPHORICAL PRACTICE**

“Mapping…can be used to capture a complex issue and make it accessible to intervention. An organizational diagnostic map is an attempt to link the thinking of organizational members about a problem’s causes with their thinking about its implications and solutions. Maps can be generated through interviews, analysis of personal cases, and observation….Mapping fosters transparency because it captures knowledge that has been tacit and scattered among different individuals” (Friedman, Lipshitz, & Overmeer, 2001, p. 771).

In keeping with the hero’s journey metaphor, Rebecca Chan Allen uses “Archetypal Change Journey Mapping” (2002, p. 32) to guide the change process. She describes journey mapping primarily as story telling which offers an overview of issues, problems, goals, and means for change. The story telling is visually depicted using her eight-stage archetypal change journey (see Figure 2). A change journey map can help a system survey the change terrain and identify possible paths and destinations. Journey mapping can help people and organizations to discover their own creative intentions and design their own change itineraries. They can custom-plan specific journeys to reach their personal and organizational goals. The eight stages focus energies toward concerted action and common goals (Allen, 2002).

Figure 2. A sample from Julee’s Journey Map (Allen, 2002, p. 89).

I use Allen’s (2002) change journey map as a transitional object. Like Roth and Kleiner (1998), the change journey map does not answer the question, “How can this organization move forward?” Using the framework of Allen’s (2002) eight stage hero’s journey, the map acts – as Allen would say “as an itinerary.” The journey map helps the group to articulate and understand,
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where they’ve been, where they are, and where they want to go. The process starts with group members completing Allen’s “archetypical change journey survey questionnaire” (pp. 36-38). Sample questions could include:

- **Call** What is motivating the creative energy in the system now?
- **Jump** What new direction does your system want to explore?
- **Trials** What are the change monsters in your system that makes change difficult?
- **Dissolution** What patterns of thoughts, feelings, attitudes and actions must be let go?
- **Discovery** What new realities or visions does your system want to create?
- **Integration** What strategies will be used to integrate new patterns or energies?
- **Application** How will the new patterns be enacted?

Group members will complete these and other questions. Data from the interviews and surveys are organized and shared with the whole group during a survey feedback session. The purpose of the feedback session is to have the group identify common themes, divergence and ultimately the creation of a change journey map by the group as a whole. Groups can creatively fashion the journey map to their desire. Ultimately the journey map will serve as shorthand to pictorially explain the change efforts: “where they’ve been, where they are, and where they want to go.”

**NORMATIVE METAPHORICAL PRACTICES**

Typically the mythic hero is called to partake in the hero’s journey; the hero soon learns that he or she must adopt “habits of being” while on the journey. Some mythic heroes like King Arthur’s Knights of the Round Table adopted a “code of honor.” The mythic hero understood that the journey would require a new way of being. Old behavior and actions would not suffice in the hero’s journey.

*Habits of being*, like the mythical King Arthur’s code of honor, involves conscious intention and requires commitment and courage to bring about a new way of being. Humanistic psychologist, Rollo May (1975) said,

> We are called upon to do something new, to confront a no man’s land, to push into a forest where there are no well-worn paths and from which no one has returned to guide us…To live into the future means to leap into the unknown, and this requires a degree of courage for which there is no immediate precedent and which few people realize…In human beings courage is necessary to make being and possibly becoming possible…But a man or woman becomes fully human only by his or her choices and his or her commitment to them (pp. 2-4).

In the preceding quote, May (1975) conjures up images of the mythic hero called to the journey – one who leaps into the unknown to obtain a future few people realize. He portrays change and transformation as a creative act. Creativity is “the process of bringing something new into being” (May, 1975, p. 32). May (1975) identifies courage, creativity, and commitment as vital *ways of being* one must adopt for the journey. Peter Vaill (1996), who coined the term “learning as a way of being” says that “Learning as a way of being is a whole mentality. It is a way of being in the world…More than just a skill, learning as a way of being is a whole posture toward experience, a way of framing or interpreting all experience as a learning opportunity or learning process” (p. 51). Vaill (1996) stressed the importance of conscious commitment to learning and change. Similarly the Organizational Hero’s Journey’s *habits of being* are a conscious commitment to identify and practice habits of being individuals, groups and organizations must adopt as they encounter every stage of the journey.
Organizational members are asked to brainstorm habits of being they think they need to practice as they experience the Organizational Hero’s Journey. The group prioritizes and identifies (by consensus) seven core habits of being they will begin to practice over time. Groups articulate a commonly shared definition of each habit of being they all agree to practice during their change journey. Additionally, groups articulate commonly shared behavior (what each habit of being looks like) of each of the seven habits of being.

The Organizational Hero’s Journey also calls for each individual group member to identify three habits of being he or she wants to practice while embarking on the group’s change journey. Individual habits of being could differ from the group’s overall habits of being. Each group member articulates a definition of each individual habit of he or she agrees to practice during the group’s change journey. In addition, each group member articulates the behavior (what each habit of being looks like) of each of the three habits of being. This aspect of the normative process assumes that each group member comes to the group with varying knowledge of his/her self. Self-knowledge includes awareness of strengths and weaknesses, talents, fears, abilities, triggers, aptitudes, motivation, passions, personality type and desired habits of being. For example, one may desire to be more patient or more self-controlled. This self knowledge is based on experiences in relationships at all levels—significant others, friends, family, community, work, etc.

EXPERIENTIAL METAPHORICAL PRACTICES

Metaphorical experiences are rooted in experiential education; therefore, a description of the term is required before going forward with an explanation of experiential metaphorical practices. Consider the following explanation of experiential education supplied by Itin (1999):

Experiential education is a holistic philosophy, where carefully chosen experiences supported by reflection, critical analysis, and synthesis, are structured to require the learner to take initiative, make decisions, and be accountable for the results, through actively posing questions, investigating, experimenting, being curious, solving problems, assuming responsibility, being creative, constructing meaning, and integrating intellectually, emotionally, socially, politically, spiritually, and physically in an uncertain environment where the learner may experience success, failure, adventure, and risk taking. The learning usually involves interaction between learners, learner and educator, and learner and environment. It challenges the learner to explore issues of values, relationship, diversity, inclusion, and community. The educator’s primary roles includes selecting suitable experiences, posing problems, setting boundaries, supporting learners, insuring physical and emotional safety, facilitating the learning process, guiding reflection, and providing the necessary information…empowerment-based education should be seen as student centered but not necessary student directed (pp. 93-94).

In keeping with Itin’s definition, experiential metaphorical practices derived from the Organizational Hero’s Journey, are what I consider adventure-based experiential education. Other terms used to describe adventure programs are outdoor-adventure training, adventure-based learning, adventured-based counseling, and adventure-based programming. However, the most approximate definition of adventure-based experiential education was developed by Ann Smolowe et al. (1999), who say that,

Adventure consulting utilizes an interdisciplinary approach that blends organization development (OD) practices; experiential learning techniques; intellectual and emotional challenges that invite risk-taking; and process intervention skills. It also utilizes skills and tools, unique to adventure environments, that make seemingly risky physical challenges an exciting safe option” (pp. 8-9).
Selecting suitable experiences

Itin’s (1999) description of experiential education bares some similarity to the role the consultant plays in using experiential metaphorical practices in the Organizational Hero’s Journey. The consultant’s role “includes selecting suitable experiences, posing problems, setting boundaries, supporting learners, insuring physical and emotional safety, facilitating the learning process, guiding reflection, and providing the necessary information” (p. 93).

Selection of suitable experiences does not convey accurately the use of experiential metaphorical practices. In keeping with the metaphor of the Organizational Hero’s Journey, organizational members immerse themselves in experiences designed by the consultant. Already this description sounds like a consultant drive process. It is not – which is part of the uniqueness of the model. Experiential metaphorical practices are informed by prior critical data generated by the client and gathered by the consultant (see Figure 3).

**VISUAL REFLECTIVE METAPHORICAL PRACTICES**

Visual Reflective Feedback as a metaphorical practice is an original innovation since, to my knowledge, there is no literature that discusses it directly. A number of publications by Project Adventure (Rohnke & Grout, 1998; Schoel & Maizell, 2002; Smolowe et al., 1999) describe “The Being,” a normative model for group change created by Baron Armstrong and myself (1997), which uses visual reflective feedback. In my view, visual representation, feedback and reflection are not separate entities. They are used in synergy with one another to enhance organizational change and experiential learning.

Learning results only after a person attributes meaning to an experience, that is, after they understand the raw data of the experience. Thus a person learns from the meaning he/she gives
to an experience, not from the experience itself, and he/she gives meaning to experience through reflection (Daudelin & Seibert, 1999). “Reflection is the primary tool to trigger learning from experience” (Marsick and Watkins, 1997, p. 304.). The goal of visual reflective feedback is to help organizational members and client systems make meaning of experience. According to Boyd and Fales (1983), "The process of reflection is the core difference between whether a person repeats the same experience several times, becoming highly proficient at one behavior, or learns from experience in such a way that he or she is cognitively or affectively changed” (p. 100). Even though experience serves as the stimulus for learning, reflection is the essential part of the process that makes it possible to truly integrate and learn from an experience (Osterman, 1990). Essentially, “learning from experience involves the interaction of action and reflection, of engaging in an experience and then making sense of what is happening. Neither action without reflection nor reflection without action produces learning; rather, learning results when action and reflection are synthesized” (Daudelin & Seibert, 1999, p. 7).

The goal of the organizational hero’s journey is to promote change in ways of doing and change in ways of being. All of the model’s metaphorical practices operate in sync to produce the kind of learning just described.

My model is similar to Zander’s (1994) description of the feedback cycle. Following an experience in a stage of the Organizational Hero’s Journey, like Zander (1994), “members evaluate their group's performance and then decide to change its objectives, methods, or both. [They] are engaged in a feedback cycle. In such a system, members set criteria of success for a given activity. Then they perform the required actions, determine the effects of such moves on the group or its environment, compare the level of the group's performance with the established criteria, decide what they should do in light of this comparison, set new goals or procedures to be followed, and move through this cycle again. The essential point is that no group can sensibly appraise and improve its operations unless it takes the steps in such a cycle” (Zander, 1994, pp. 224-225). This process is also depicted visually on “the Arena.”

Much like a map is a physical representation of a geographic area, the Arena, a 6’x7’ sheet of white paper, will serve as a physical representation of the client’s experience of the change journey. The Arena represents the client’s change journey via visualized reflective feedback. I identified Allen’s (2002) seven stages of the change journey. Each stage of the change journey (call, jump, trials, dissolution, discovery, integration and application) occupies a designated area in the arena. Furthermore, each of the “habits of being” will occupy a designated area within each stage of the change journey (see Figure 4). Earlier I defined habits of being as norms and values that groups and individual group members endeavor to practice habitually as a way of being. The client will use a color-coding system to indicate progress toward or regression from the group’s practice of the habits of being. The product of this reflective process is a visualized feedback mechanism for the group by the group. This visualized reflection provides group members with vital information about the group’s change journey, directs their next steps, and marries knowledge and action.
Small green, yellow and red tags will be put inside the image. The green represents progress, yellow represents no change and red represents regression. Each participant will place both red yellow and green tags in any of the habits of being as they deem appropriate. After a stage of the change journey has been completed, prior to the group reflective dialogue, each participant will evaluate how well he/she thought the group performed in terms of the habits of being the group identified. For example, if the group practiced "patience" during a particular stage, he/she might put a green tag in that area or a red tag if patience wasn’t practiced. Participants should only put one tag each in whatever particular habits of being they chose. An in-depth reflective dialogue follows.

A similar reflective feedback process is prescribed for each individual group member. Each group member will seek and have the opportunity to receive visualized feedback from group members. For each group member, stages of the change journey and habits of being will occupy a labeled designated area in the arena. However, in contrast to the group as a whole, each group member’s stages of the change journey and habits of being will be located in the spectator area in the arena.
Individual group members will use the same coding system as the group as a whole. After a stage of the change journey has been completed, group members can assess their own habits of being and provide feedback to other group members on how well he/she thought the individuals practiced the habits of being to which they each committed. For instance, if the individual did not practice "awareness" during a particular stage the individual might self-assess and put a red tag for a particular habit of being. A group member might also put a red tag in that individual’s area or a green tag if the individual practiced awareness. Group members should only put one tag each in whatever particular habits of being they chose for the individual. Group members are required and will be given opportunities to give an explanation of the feedback they provided. An in-depth reflective dialogue follows.

Visual reflective metaphorical practices, specifically the use of the arena and its color coding system provides ongoing feedback of how the group is progressing in its change journey. In addition, the process supports change in ways of doing and way of being

CONCLUSION

The Organizational Hero’s Journey contributes to the field of OD, particularly the model’s metaphorical practices. Mythic metaphorical practices, using the Organizational Hero’s Journey seven stages provide the client with a language and a way to see and understand the change process. Normative metaphorical practices compel the client to explicitly identify “habits of being” the client will practice throughout the change journey. Mapping – as a metaphorical practice creates organizational story telling through the lens of the seven stages, offering clients a way to articulate and map their change itinerary – where they’ve been, where they are, and where they want to go. Experiential metaphorical practices enable clients to live in, experience and learn from the Organizational Hero’s Journey metaphor. Visual reflective metaphorical practices allow members to evaluate their group's performance and then decide to change its objectives, methods, or both. The use of the “Arena” and its color-coding system provides ongoing feedback of how the group is progressing in its change journey. Taken together, the sum of the Organizational Hero’s Journey – its metaphorical practices are used in synergy with one another to bring about organizational change.
REFERENCES


Orange, D., & Armstrong, B. (1997). When adventurers chart their own path: a new model. Zip Lines, Fall(33), 26. *Note: Actual name of co-author was changed to protect the privacy of the client


