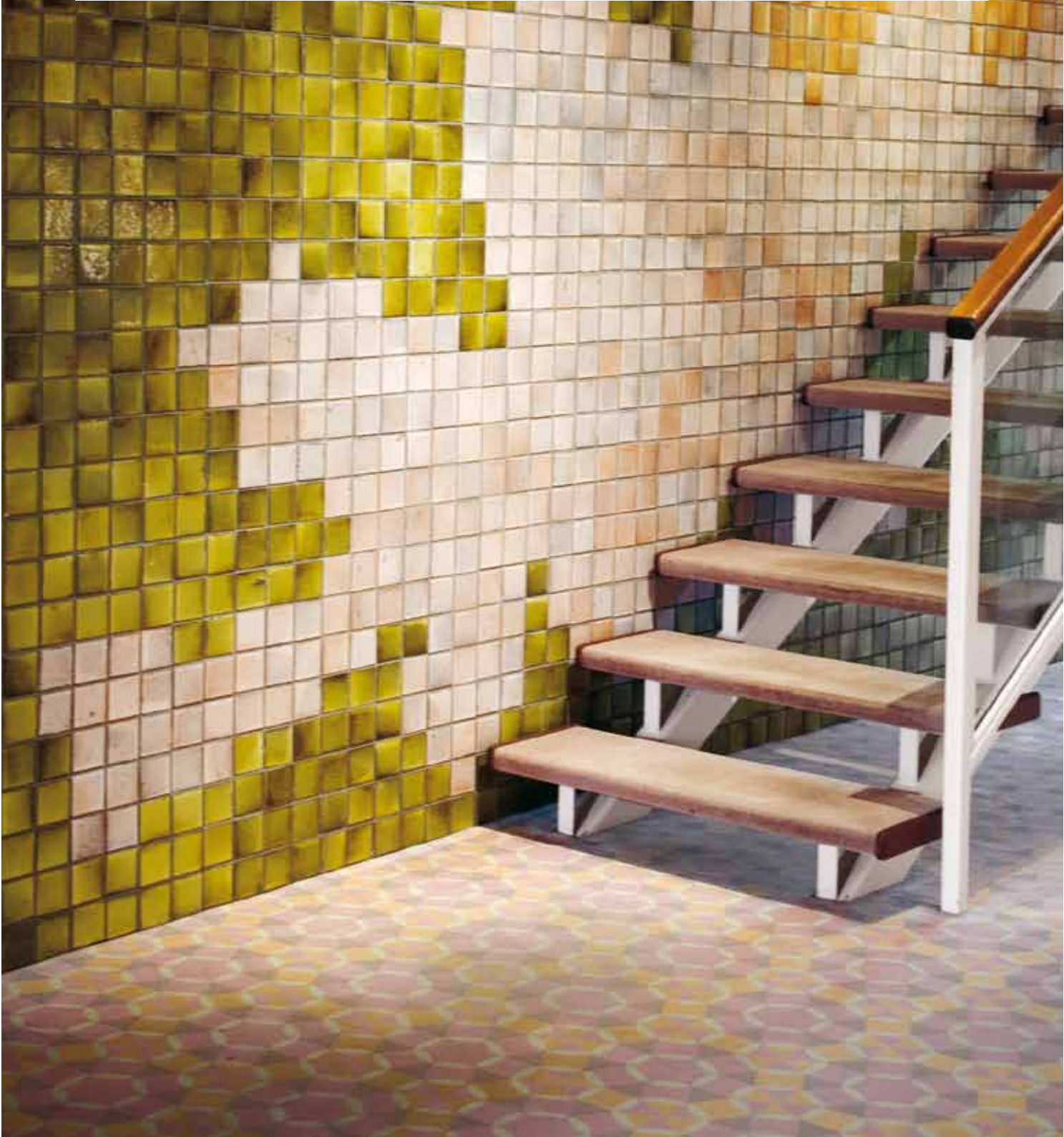


# Strategy development and organizational design through discourse

Developing strategies · Designing organizations · Exploring markets  
Enabling cooperation · Generating insights · Moderating shared understanding





# About us

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Eberhard and Wolfgang Schnelle founded Metaplan in 1972 in Quickborn, a suburb of Hamburg. The company was a pioneer in the realm of strategy and organizational consulting in Germany. Today, Metaplan counts 30 consultants and has offices in Germany, France, Sweden and the United States.

We have been advising companies and organizations across sectors for over 35 years. Since the very beginning, we have consistently integrated the findings of organizational research into our daily work, as we question established structures and are driven by a strong desire to learn.

Our clients' top priority is to master organizational and cultural change. Our experience has shown that discursive consulting makes this work.

## **Our areas of expertise (as described in the following pages)**

**Developing strategies**

**Designing organizations**

**Exploring markets**

**Enabling cooperation**

**Generating insights**

**Moderating shared understanding**



# Our areas of expertise

## Developing strategies

Discursive consulting sees strategies as a course of action for the future. In addition to economic targets, strategies must take non-economic factors into account. These are based on organizational structures, stakeholder interests, power and micropolitics. A course of action should be clearly defined and provide orientation for both the organization and the market. At the same time, however, it should be open and have a broad enough scope to withstand potential future threats.

The challenge lies in taking a sufficient level of complexity into account, even in the early stages of strategy development. Elements that have not been considered in advance may well strike back later on. To avoid pitfalls that result from a lack of foresight, we moderate processes that lead to shared understanding. These processes take into consideration the mindsets, interests and rationales of those functions and executives that will be responsible for reaching the desired targets. As the discourse progresses, closed thought structures are being opened, making it possible to gain new insights and strike a balance between contrasting positions. As a result, a roadmap for actions and communication guidelines can be negotiated that all participants are willing to accept and take responsibility for.

In the implementation phase, the actors required to execute the strategy must also have a forum in which their concerns can be openly discussed. Discourses ensure that the relevant actors take ownership of the strategy and are willing to contribute to its implementation. This helps to avoid the “implementation trap” that often causes failure of strategy processes.

## Designing organizations

To redesign an organization, it must first be deconstructed and understood. This requires a sound awareness of formal and informal structures. To develop this awareness, a number of factors must be taken into account in addition to strategies, organizational charts and decision makers. These are e.g. mindsets, vested interests, power, micropolitics and conditions that either promote or threaten trust. All of these elements are interconnected: their impact on both formal and informal structures must be considered early on, and their implications must be assessed.

The process of “organizing” is one of the most powerful levers that management can apply to reach its goals. This lever can be highly effective if the organization’s complexity is already considered during the design phase. Topics that are critical to success must be channeled to the appropriate decision makers. Moreover, reliable decision-making routines are required to help the relevant stakeholders tackle core topics. Finally, influential factors must be balanced in such a way that power and responsibilities are allocated in a productive and complementary manner.

If these factors are adequately considered, paths can be created that lead to acceptable solutions. This applies both to recurring cooperation and coordination tasks as well as to the major structural adjustments required for strategic change.



### Exploring markets

Strategic action must be based on reliable forecasts of how market partners can be expected to behave in the future. Sales and marketing activities aim to influence the views of market partners, who follow their own specific rationales and behavioral patterns. In order to develop an effective marketing strategy, marketers must be able to relate to and understand these rationales and behaviors.

An additional challenge is that market partners often consider their assumptions to be self-evident, which explains why they fail to mention them in market surveys. A similar problem arises when surveys are based on the interviewer's implicit assumptions, which is often the case in market research. As a consequence, survey results are often unreliable and cannot accurately explain or forecast actual market behavior.

Interviews and discussions in peer groups are the tools of discursive market exploration. Such meetings are based on participants' real decision-making situations and deliberately bring out controversial views. The discourse makes it possible to understand and influence hidden thought and behavioral patterns and their implicit assumptions. The process creates a reliable basis for the development of effective sales and marketing strategies.

### Enabling cooperation

Cooperation, coordination and communication are a constant challenge for every organization. Whether overall corporate targets are reached, strongly depends on how well these mechanisms between organizational units function. It is each company's task to handle this "maintenance task" in a targeted and consistent manner.

The objective should not be to improve the mechanisms as such. Rather, specific problems should be targeted that must be overcome to improve or initiate cooperation. These challenges often arise at an organization's interfaces and predetermined breaking points, where different interests, mindsets and power games collide.

It is in these very areas that we initiate discourse between parties with the relevant decision-making ability. Such a process allows for open debate, which in turn helps overcome barriers and enables cooperation.

### Generating insights

When a topic is complex and clouded with different opinions, we clarify the diverging points of view and make them easier to understand. We give discussions a clear structure, draw attention to priorities and initiate debates on controversial. In order to generate new insights that go beyond an unsatisfying compromise, we purposefully lead the discussion toward critical issues and meticulously work our way through them. To this end, we first examine both the factual aspects and the micropolitical circumstances in a detailed manner.

Our role is to ensure that the discourse focuses the real issues. Conflicts of interest are explicitly addressed, misunderstandings are clarified and seeming conflicts avoided.

The resulting insights clarify what is feasible and what is not. A pragmatic and robust basis is created upon which the relevant parties can progress together. Indeed, shared understanding is a prerequisite for long-term commitment.



## Moderating shared understanding

### Metaplan® Moderation

Prior to Metaplan's establishment in 1972, its founders developed the moderation method as a useful tool for group interaction in organizational consulting. The method is effective and easily applied; for this reason, it has become widespread. Since its very beginnings, the original "Metaplan® Moderation" method has set the bar for high quality.

Often, moderation is equated with the active involvement of participants during a session where they share their thoughts at random. This does not reflect the entire truth. Active participation alone cannot guarantee that a shared understanding is reached, or that the group can develop a solution that all participants will take ownership of.

Our approach is based on the participation of a select group and on targeted moderation. Participants are selected based on each stakeholder's relevance for the topic at hand, and interventions are target-oriented: we develop discourse dramaturgies that provide a clear structure. These dramaturgies define the scope of the topic to be discussed and provide direction for thought. At the same time, they include enough space for the appropriate level of openness and flexibility.

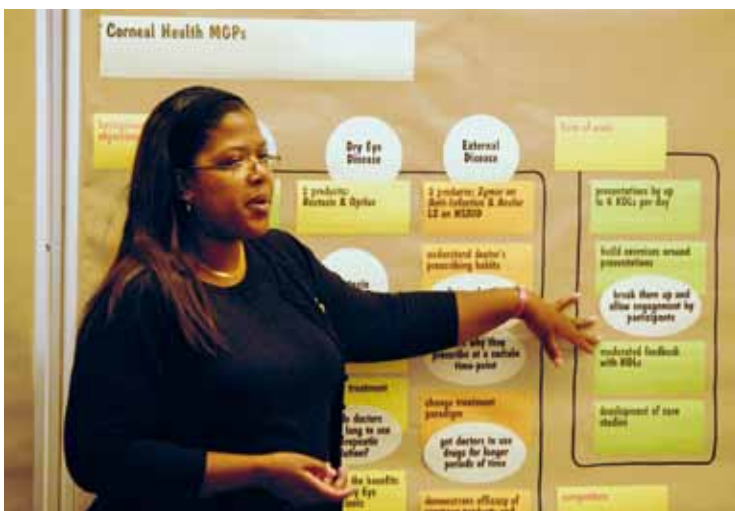
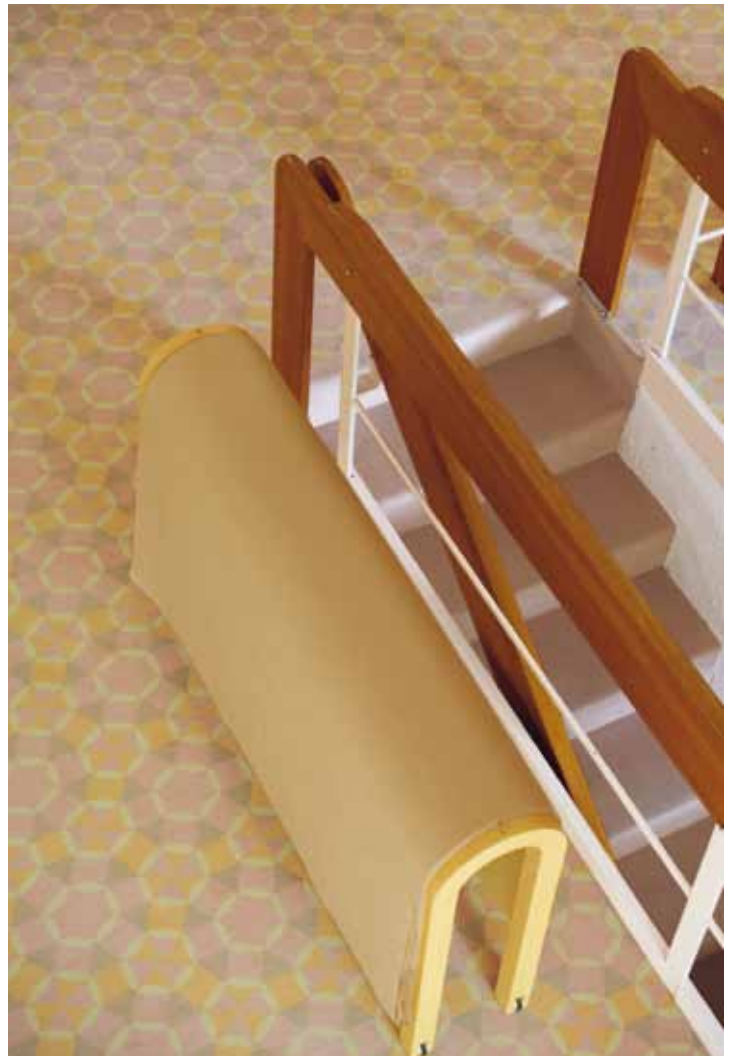
The discourse is moderated in a stakeholder-oriented manner. We intervene where reaching a shared understanding requires that thought structures be opened up. To this end, we examine the different interests and potential power-related issues beforehand and consider them in our moderation.

The core principles of "Metaplan® Moderation" are as follows:

- Capture different thoughts, make them visible and put them in a particular order: This creates a detailed overview of the relevant topics and their relation to one another
- Keep the debate on the right course: Simultaneous visualization prevents the discussion from going around in circles
- Ensure that all participants are actively involved through interaction: We prevent the most talkative from delivering monologs and encourage the most reserved to contribute
- Include different points of view and the interests behind them in the discussion: This makes it possible to reach a better understanding of each position
- Encourage participants to express their doubts and objections: This creates the space needed for clarification and gradual acceptance
- Overcome firmly entrenched thought structures: Statements are critically questioned to distinguish between facts, opinions and intentions
- Encourage agreement and action: Action should be taken as soon as it makes sense for those responsible for its execution









# Leading Through Understanding

from 1959 until today

**1959**

**“Eberhard und Wolfgang Schnelle GmbH” is founded in Hamburg.**

Open spaces provide room for open thought processes. Two brothers, Eberhard Schnelle (1921-1997) and Wolfgang Schnelle (1930-2005) are convinced that the processes, environments and furnishings required for work must be planned together. They integrate dynamic group processes with planning and decision-making. Officescapes are created as a result. The construction of a communication-friendly administrative building in Boehringer, close to Mannheim, Germany, is one of their most major projects.

**1962**

**The company moves to Quickborn, a suburb of Hamburg, Germany, and changes its name to “Quickborner Team”.**

The Quickborner Team plans and creates officescapes for a number of industries in Germany and abroad. Its clients include IBM in New York, Bertelsmann in Germany, Krupp, BBC, Orenstein & Koppel, Ford, Osram, Deutsche Lufthansa and Shell in Venezuela.

**1970**

**With his thoughts on “Negotiation and problem-solving as forms of conflict resolution”, Wolfgang Schnelle creates the theoretical foundation for Metaplan’s future work.**

**1968**

**Eberhard Schnelle develops the decision makers’ training seminar.**

This new concept can be applied to identify complex problems, reveal conflicts, develop solutions and elaborate joint action plans. Cards and packing paper are used to help structure communication.

**1972**

**Metaplan GmbH is founded**

The company’s work focuses on: Training decision makers and planners | Introducing new, problem-oriented approaches to planning | Developing information markets | Moderating conferences that encourage frequent interaction between large groups. The year of the company’s founding, Metaplan consultants support a number of major projects, including the Siemensforum in Munich.

**1975**

**First major projects**

Metaplan contributes to the establishment of the “Humanizing work” research program, a joint initiative of Germany’s Federal Ministry of Education and Research and Federal Ministry of Labor. As a result of growing interest in Metaplan’s communication method, the first set of “Metaplan Moderation” guidelines is developed. Over the course of extensive collaboration with Krupp Group’s top management, the full scope of the Metaplan method is applied for the first time. The method is characterized by a flexible moderation space, the visualization of discussion results on posters and the training of a permanent group of moderators.

1960

1970

1980

### 1981

The communication center in Quickborn is expanded.

In 1988, Germany's Capital magazine nominates the facility as one of Europe's best conference centers: "Metaplan Quickborn is the best possible place for active group work."

Metaplan SARL is founded as a Metaplan subsidiary in Rungis, a Paris suburb.

Two years later, the company moves to Nozay. From this point on, major projects are executed in France for clients including Carrefour, Peugeot, Snecma, Dassault and Renault.

### 1987

Metaplan consultants lead the "Tensobon Cardiac Insufficiency Forum."

At workshops and plenary sessions, specialist physicians make complex medical knowledge understandable to other medical professionals. Wolfgang Schnelle introduces the idea of therapeutic circles as a form of physician training in 1984. The circles serve as a forum in which medical doctors can discuss treatments and their experiences with new drugs. The therapeutic circles are funded by pharmaceutical companies with the aim of getting to know their clients better. In projects with Chibret, Novo or Bayer, Metaplan serves as an intermediary between the different mindsets of physicians and industry.

### 1993

The new office building is completed in Quickborn.

Designed by Ernst-Dietmar Hess, the landscaping is awarded first prize in the Schleswig-Holstein Chamber of Commerce's "Green work environment" competition.

### 1998

Metaplan's service offer is expanded to include the following topics: moderation, visualization, dramaturgy development, leading discourse as well as power and shared understanding.

Metaplan continues to develop its approach to leading discourse, enabling moderators to better cope with barriers and objections. The approach to leading discourse includes a set of analytical tools and background knowledge drawn from organizational science.

### 2001

Metaplan LLC is founded in Princeton, New Jersey, USA.

An international team provides consulting services for major pharmaceutical projects.

Metaplan develops the "Lateral Leadership" management and seminar concept.

### 2003

From discourse to strategy

At a conference entitled "The limits of strategy consulting – A comparative view of scientific, consulting and client perspectives" at Munich's Ludwig Maximilian University, Dr. Thomas Schnelle and Professor Stefan Kühn coin the term "discursive strategy consulting." Metaplan's discursive approach ensures that strategies are implemented.

### 2007

Metaplan launches its "Discursive Consulting" training program.

The program's main focus is "organizational design and strategy development through discourse." The one-year, part-time training program is designed for executives and consultants. It draws on the knowledge and experience that Metaplan has acquired over the course of its 35 year history in the consulting business. External speakers include Professor Stefan Kühn and Professor André Kieserling of the University of Bielefeld.

1990

2000





# Discursive management

Companies are complex social systems. Despite this, current concepts for decision-making processes, organizational design and leadership are often based on a simplified mechanistic view. There is a popular misconception that everything can be organized and controlled. This can have serious consequences: decisions made over the course of elaborate processes may have little effect, new organizational structures may be rejected and instructions simply ignored. In some cases, management initiatives fizzle out or lead to confusion within the system.

Discursive management demands that management approaches be revised to eliminate any illusions of control. It addresses the complexity of the situation at hand and tackles it with a methodical understanding process between different stakeholders. In short, discourses enable the management to lead in targeted and effective ways.

The actors whose knowledge and support are required for a specific purpose are the starting point and target of discursive management. Their thoughts and views should therefore be taken seriously. This requires respect for their concerns and realities. Based on this foundation, new directions can be defined that the actors accept and are willing to take responsibility for.

This approach is well-suited to modern organizations. Discursive management ensures their ability to perform, as it solves relevant target conflicts and prevents wasting resources on seeming conflicts. In short, it represents a management style within which directive and participatory approaches complement one another.

Discursive management means

## **Leading through understanding**

**Understand** – understanding the people that you rely on makes it possible to generate buy-in.

**Agree** – agreeing on common and diverging interests can create new room to act for you and your cooperation partners.

**Lead** – applying this lever in the design and implementation phase leads to the success of your endeavor.



# Discursive consulting

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Discursive consulting brings about a structured discussion between parties with different interests. It aims at the successful execution of a complex project. It ensures that the shared understanding required to implement strategic or organizational change is reached.

Organizations in which there is a division of labor are broken down into functions, business areas and departments. Each of these organizational units is in charge of specific tasks. Therefore it develops its own interests and professional views. This set-up is both deliberate and efficient: each unit focuses on its own sub-task.

This also means that each unit has its own interpretation of the organization's overall targets, which is linked to a specific set of interests. These differing interests collide at organizational interfaces, as they are not automatically directed towards a common goal. When this occurs, reaching shared understanding may be difficult. While an idea may seem rational to one unit, it may be incomprehensible to another.

Defining a course of action from the bottom up makes little sense, as it risks perpetuating existing structures. However, in complex organizations, shared understanding cannot simply be prescribed from the top either. For important issues, the knowledge and input of several units are required to develop functional solutions. Shared understanding must be reached by involving the relevant stakeholders; these arrangements are an effective means of developing solutions that all the relevant parties can accept and commit to. Such processes require discourses.

The discursive approach also encourages participants to take ownership of an issue and contribute actively.

Reaching shared understanding is a complex leadership task on which the success or failure of a project depends. We at Metaplan help strengthen our client's ability to rise to the occasion by planning and moderating processes that lead to their objectives.



# A scientific foundation

While science and consulting are two different disciplines, both encourage critical analysis and further thought. For this reason, we support academic research projects, and our day-to-day consulting work is often inspired by the scientific approaches of organizational research. Without a doubt, our consulting projects benefit from our ongoing dialog and strong interest in science.

Five core approaches of organizational research shape our work:

- Based in behavioral science, *Herbert Simon* and *James G. March*'s theory on decision-making presents the insight that decisions are always made without a full awareness of possible consequences or alternatives
- *Niklas Luhmann*'s systems theory: Luhmann's earlier work in the realm of organizational theory clearly showed that both formal and informal structures must be considered for organizational change to succeed
- *Michel Crozier* und *Erhard Friedberg*'s micropolitical theory reveals that power is an integral part of organizations
- *Ludwik Fleck*'s epistemological theory explains why deeply entrenched thought structures develop within organizations
- *Jürgen Habermas*' discursive ethics defines people as rational beings that can find orientation through thought



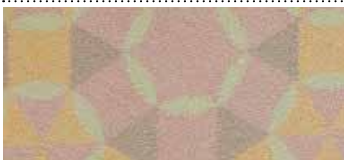
# The distinguishing features of a Metaplan consultant

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Metaplan consultants are individuals with a variety of professional and academic backgrounds in business, sociology or history. Prior to pursuing their 'calling' in discursive consulting, many Metaplanners held management positions at different companies around the world.

We act as intermediaries between different ways of thinking. Metaplanners are characterized by the ability to see all sides of an issue, the courage to implement change and a passion for reflection. Additional distinguishing features include a high level of curiosity and a strong determination to get things done. Apart from these common features, there is no standard profile. The focuses of our work are as diverse as our professional backgrounds. In past careers, Metaplan consultants have been media executives, flutists, experts for the execution of sustainability studies, university lecturers, entrepreneurs and business journalists. What is more, we work in several languages.

All of us share the basic conviction that shared understanding is required to get things moving. To achieve it, we apply our own, sometimes headstrong approach to discourse. This means that we often ask uncomfortable questions until the core of the issue is truly understood. We are fascinated by people and the ways they think and act, and we thoroughly enjoy tackling complex topics and organizational challenges. Dedication, a direct approach and the ability to improvise characterize our work.



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## Metaplan Quickborn



**Dr. Thomas Schnelle**  
Managing Partner

**Dr. Thomas Schnelle** joined Metaplan in 1987. Today, he is Managing Partner of Metaplan Quickborn. His areas of expertise include strategic planning processes and organizational design in marketing and sales. He often works with clients in the pharmaceutical and biotech industries. He also enjoys advising family-owned companies, other consultancies and associations. Prior to joining Metaplan, he worked in production management at a shipyard. He studied industrial sociology, political economy and epistemology at the Universities of Bielefeld, Manchester, Warsaw and Hamburg.



**Dr. Kai Matthiesen**  
Managing Partner

**Dr. Kai Matthiesen** joined Metaplan in 2001, and has since become a Managing Partner of Metaplan Quickborn. His areas of expertise include the development of strategies and mission statements, organizational design and brand-related issues; particularly for the media industry, family-owned companies and the consumer and luxury goods industries. He is also a lecturer at the University of St. Gallen. Prior to joining Metaplan, he was Managing Director of Alta Vista Germany. He has also held several management positions at family-owned companies and at Berthelsmann AG. His consulting career began at Booz Allen Hamilton. He studied business administration at the University of Passau and completed a Ph.D. in business ethics at the University of St. Gallen.

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## Metaplan Princeton



**Franz-Josef Tillmann**  
Managing Partner

**Franz-Josef Tillmann** has been Managing Partner of Metaplan Princeton since 2001. His areas of expertise include strategic planning processes, lateral leadership and market exploration, particularly in the pharmaceutical industry. Prior to joining Metaplan, he was Director, Global Strategic Marketing at Johnson & Johnson. He also held a number of management positions in marketing and sales at Schwarz Pharma in Germany and the United States. He holds a degree in geography from the University of Bayreuth and an MBA from New York University's Stern School of Business.

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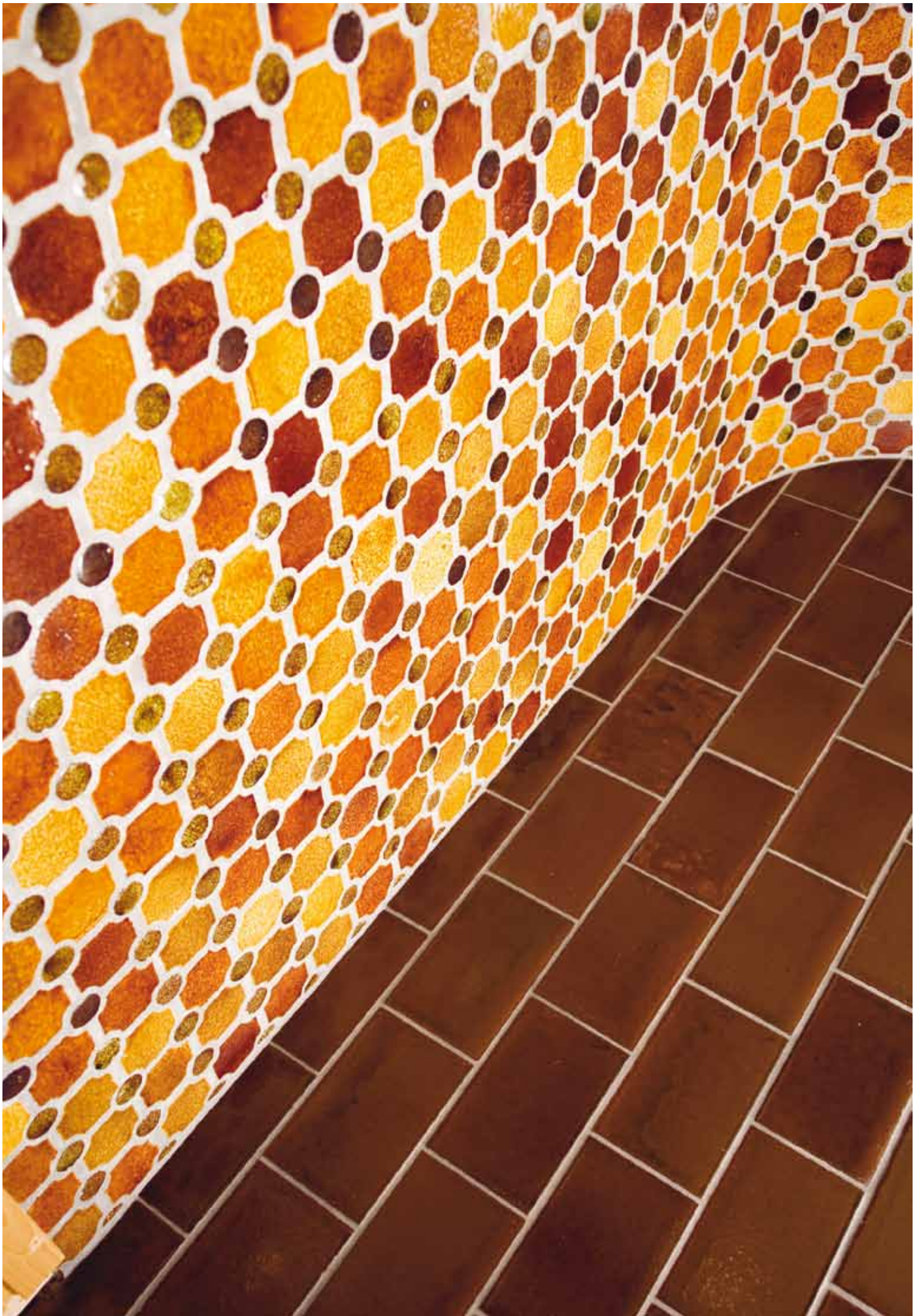
## Metaplan Versailles



**Michel Borcier**  
Managing Partner

**Michel Borcier** Michel Borcier has been Managing Partner of Metaplan Versailles since 1994. His areas of expertise include strategic planning processes, organizational consulting and market exploration, particularly for the pharmaceutical industry, retail chains (Grande Distribution, Vente à Distance) and luxury goods industry. Prior to joining Metaplan, he worked as a journalist for business publications. He studied political science and economics at the Institut d'Études Politiques in Paris and foreign languages at the Université Paris X in Nanterre.





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Leading Through Understanding

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