



REFRAMING

Assignment 1 for PMQ504

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This essay will consider a personal perspective on whether reframing can alter behaviour in a project setting. It will examine theories about how decisions are made by individuals and groups and how cognitive biases can interfere with the rational processes employed. A rejection of the individual as a completely rational decision maker will lead to a discussion of how people make decisions using less than completely rational means. Heuristics and the ladder of inference will be considered, as will personality and its effect on the rational processes of groups. The concept of reframing will be examined both from an historical and modern perspective. Anecdotes from the personal and the project team perspectives will be provided, and I will conclude with a reasoned opinion regarding the value of reframing in a project setting.

In 1955 Herbert A Simon challenged the traditional view of the completely rational decision maker. Instead, he proposed a decision maker with a crude and simplified approximation of the topic, incomplete knowledge of alternatives, limited time and limited cognitive processing capacity. This led to people employing “schemes of approximation” and assumptions in dealing with complex choices (Simon, 1955, p. 101). Psychology Today agrees, stating people do not ordinarily consider all possible solutions when solving a problem. Instead, they pick a subset of solutions and shortcut the algorithm that would be used to consider all possibilities. This “heuristic strategy” uses less cognitive effort but still usually delivers an acceptable solution (CRM, 1972, pp. 164-165). While the heuristic approach is of immense practical use, it is not infallible. It has inherent flaws that sometimes deliver disastrous outcomes and it often leads to interpersonal conflict.

Economics and project management both tend to assume everything can be allocated a monetary value and that people will always act in their own rational self-interest. Contemporary politics shows us that people do not just make choices in their economic interest, but also what accords with their ideology, or even what is more fun (Moss, 2018, p. 6). The heuristic approach to decision making is efficient, but fallible. Tversky and Kahneman conducted empirical research and found three heuristic techniques people commonly used to solve problems. Representativeness, availability and anchoring. Each is highly economical and effective, but leads to systematic bias and predictable errors (Connolly, Arkes, & Hammond, 2000, pp. 3-20). Representativeness is when people make assumptions about things based on how similar they are to things they already know about. Availability is when someone estimates if something is likely based on how readily examples come to mind. Shark attacks, for instance, are rare, but their ease of recall makes people overestimate the risk. Anchoring is when someone relies more heavily on the first piece of information they hear than information they hear afterward (Psychology Today, 2020).

People use heuristic shortcuts to make decisions efficiently, but why is this important in a project management context? How do people inform the intuition they employ in forming opinions and making decisions? Chris Argyris believed people do this by climbing a ladder of inference, taking in readily observable information and adding meaning to it as they reach each rung (Argyris, 1982, pp. 8-9). Argyris identified 4 rungs on the ladder of inference: 4. Meanings imposed by the researcher, 3. Meanings imposed by our theories-in-use, 2. Culturally understood meanings, and 1. Relatively directly observable data, such as conversations (Argyris, 1982, p. 9).

This was expanded by Rick Ross (P. Senge, Kleiner, & Roberts, 2011, p. 442) to include seven rungs:

7. Actions taken based on beliefs
6. Adoption of beliefs about the world
5. Drawing conclusions
4. Assumptions based on added meanings
3. Meaning added (from culture and personal experience)
2. Selection of data from observations
1. Observable data and experiences

and a reflexive feedback loop between the adoption of beliefs (6) and selection of data (2) that affects which data is selected from observations the next time the ladder of inference is climbed. This feedback loop is important because every participant in a project management meeting arrives with different beliefs about the world due to climbing the inference ladder millions of times in a differing environment. Everyone sees or hears the same thing on the first rung of the ladder but from that point on everyone has a different experience. In a project setting this means ten people can all see or hear the same thing, make different inferences, and each decide on a completely different course of action.

Personality also plays a part in how people add meaning to what they observe. Jung proposed the idea of personality type in 1921 his book, *Psychological Types*. Jung believed the self was composed of the interaction between two attitudes and four functions. The attitudes were introversion and extraversion and the functions were thinking, feeling, sensing and intuiting (CRM, 1972, p. 425). Briggs and Myers added a dichotomy between Judging and Perceiving to Jung's typology and developed a test to determine a person's 4 letter Myers Briggs Type Indicator (Myers, 1995). Cattell conducted empirical research and concluded there were five global traits that could be used to describe personality: Extroversion, Anxiety Neuroticism, Tough Mindedness, Independence and Self-control (Cattell & Mead, 2008). Personality research provides ample evidence that different people use quite different cognitive processes when presented with the same information, as well as when making decisions. Personality also affects the way people interact, and the way they expect others to behave. The meanings added on the ladder of inference can be dramatically affected by the personality of the climber. The heuristic shortcuts described above compound this situation. I am INTJ according to an official test from the Myers-Briggs foundation. It is a rare type with only 2% of the population testing as Introverted, Intuitive Thinking and Judging. The characteristics of this type give me a significant advantage in innovation and problem solving, but the type rarity means most people do not understand how I rapidly diagnose problems and confidently present solutions. My ability disturbs people who function differently and can lead to incorrect assumptions about my credibility and motivations, or even personality clashes during project meetings.

The ladder of influence is particularly important when change and innovation is involved. In a recent product launch Udi Makadi, CEO of CyberArk, explained, "Innovation is not easy. Taking an idea from inception to a product needs a lot of creativity, energy and amazing teamwork" (CyberArk, 2020). This idea of including creativity as part of the project management process is central to a paper by Mahmoud-Jouini, Midler & Silberzahn, who

believe project management is trapped in a mechanistic paradigm of control that leads to poor results in contexts where innovation is necessary, and uncertainty is prevalent (Mahmoud-Jouini, Midler, & Silberzahn, 2016, p. 144). According to Peter Senge, changes and innovations that produce significant leaps in performance are threatening to people and teams performing closer to the norm. This threat is compounded when the planned improvement is achieved through changed methods that are poorly understood by participants at the beginning of the process (P. M. Senge, 2006, p. 297). For members of a project management team operating in the traditional mechanistic frame of control, anything that departs from the tried-and-true methods in the Project Management Book of Knowledge may be seen as threatening and evoke defensive rather than a cooperative behaviour. Members of the team, by using heuristic shortcuts as they climb the ladder of inference, may not even know why they are obstructing progress.

I was introduced to the ladder of inference by Cosmos Marendy, a Regional Manager with the Queensland Department of Education. I was at a loss understanding why my advice was being ignored by clients despite a proven record in meeting their needs and protecting their systems. Cos explained my record did not matter because these facts were being filtered out at rung 2 on the ladder and meanings were being informed by cultural factors on rung 3 that had nothing to do with me personally. This led to faulty assumptions and conclusions, which fed back from rung 6 to rung 2, perpetuating the process. His solution was to somehow break out of this feedback loop and reset the relationships. Reframing.

Reframing is “changing the conceptual or emotional viewpoint in relation to which a situation is experienced and placing it in a different frame that fits the facts of a concrete situation equally well, thereby changing its entire meaning” (Mosby, 2016, p. 1533). This refers to changing a “frame of reference that reflects a person’s social status, cultural norms, and concepts (Mosby, 2016, p. 724). Cornel and Tiberiu considered reframing to be seeing things from a different perspective. They considered reframing essential in creative thinking and a natural extension of lateral thinking. They believe any behaviour can be reframed resulting in better understanding, better communication and increasing the likelihood an individual or group would achieve its goals (Iosif Cornel & Tiberiu, 2011, p. 8).

Aaron T. Beck recognised cognitive reframing as a means of overcoming cognitive distortions and deficiencies. Beck recommended a distancing as a process of gaining objectivity, subjecting the thought process to critical examination and drawing a distinction between thoughts and external reality. His patients were often surprised they had been equating inference with reality and attaching a high degree of truth value to distorted concepts (Beck, 1993, p. 349).

Beck examined reframing in modern times, but the concept is not a new one. Epictetus, who lived between 50 CE to 130 CE, encouraged daily self-examination and believed that people are not disturbed, by things, but by the opinions they form concerning things (Epictetus, 2004, p. 4). Marcus Aurelius, who lived from 121 CE to 180 CE, suggested we should attend carefully into what others say and enter as far as possible into the mind of the speaker (Aurelius, Hard, & Gill, 2011, p. 56). I consider myself a modern Stoic. I unconsciously employed the stoic reframing techniques suggested by Epictetus and Marcus Aurelius until I read of them in later life. Now I apply them deliberately.

Initially I was sceptical about reframing. My own working culture insisted I stand on my record and let my actions and results speak for me. I had been taught that if I am doing my own job correctly, I should be unnoticed as others go about their own work with no interruptions from the systems I maintain. This worked well for me as a junior technician but started to break down as I became more senior and change management became important. I had to reframe my own perceptions and attempt to influence others to undertake a reframing process.

Reframing revealed I had to “manage up”. Today we can look to Mary Abbajay for advice on how to do this. Her work identifies my supervisor as a micro-manager who had deep seated a need to know what I was doing at all times. In minute detail. My silent efficiency was getting the job done in keeping with my own cultural conditioning, but it was not meeting his needs. I had to re-evaluate my performance with his needs in mind and reframe the way I worked. Far from remaining invisible and unnoticed, I had to become much more visible. (Abbjay, 2018, p. Chapter 11). I found this cultural change incredibly difficult as I was trapped in my own feedback loop on the ladder of inference.

In a project context I took full advantage of cognitive reframing and its effect on the ladder of influence in February of 2011. In the aftermath of Cyclone Yasi, the State Emergency Service in Townsville were unable to deal with the sheer volume of calls for assistance. Although an electronic incident management system was available, the SES was still using a paper-based system, and it was being overwhelmed. Over 70% of the time emergency crews were attending jobs that had already been completed. Time critical new jobs were languishing in piles of paper. The creator of the electronic system turned up in person and loudly told the entire situation room “you are doing it all wrong, you have to do it the way I wrote in the manuals”. His statement caused distress to everyone present. It was perceived as both an insult and a threat. He was initially ignored and then escorted to the airport and put on a plane back to Brisbane. He was literally run out of town! The fact he was absolutely right was irrelevant. Astonished, I decided I had to reframe the situation and offer to run a change project. I waited until the next day to let people calm down and approached the Incident Controller privately. I put it to him: “What if I could turn this situation around in less than 5 days without using any extra resources?” This reframed the situation from “You are doing it wrong” to “I can help and what have I got to lose?” I outlined my plan and won his support. The next day the entire Townsville contingent was sent home on stress leave and replaced with a crew who had not yet experienced the soul crushing failure of the paper-based system. I began moving the workload from the paper system to the electronic system in small stages, demonstrating I could cut back immediately if anything went wrong. I kept the Incident Controller fully informed with reports several times per day. I slowly included more people in my new system and after 3 days the piles of paper were being ignored. From day 3 the SES were not attending any calls that had already been completed and critical jobs were being radioed to units in the field as soon as they occurred. By day 4 scheduling of tasks was optimised and the backlog that had been growing uncontrollably was diminishing. On day 5 I conducted training and handed the new system over to a fresh crew with the change project a complete success. Had I persisted with “you are doing it all wrong” I too would have been run out of town. By reframing I took exactly the same situation and resources and achieved a far better outcome.

Reframing continues to improve communication and outcome in business today. The November 2020 issue of HRM, the Magazine of the Australian Human Resources Institute, has a feature article titled "Looping Back In". The article notes the traditional attitude to someone leaving a job to work for another organization was to blacklist them as disloyal. They would never be welcome inside the doors of the organisation again. The authors demonstrated that reframing can change this view to one of recognising that these employees are so valuable and skilled another company has sought them out and offered them better conditions. This allows for the return of ex-employees with even better skills and more industry experience at a later date (Hernandez, 2020, p. 21).

This essay began with the rejection of the completely rational decision maker and followed the consequences of that rejection into the heuristic processes that a less than rational person uses to deal with time-critical decisions in a complex world. The main heuristic methods were listed and the way in which each is susceptible to inherent bias was discussed. Heuristic decisions feed directly into the ladder of inference and the feedback loop in that process can magnify erroneous assumptions and add false meaning to all subsequent observations. Of particular note was the way novel processes that improve performance can be interpreted as threats by group participants and a defensive reaction can be magnified to the point of irrational opposition by the feedback process. The role of personality and the assumptions made about people with rare personality types was introduced. This led to a discussion of reframing as a means of resetting the ladder of inference and allowing participants to view a situation from a different viewpoint. Reframing allows an individual, group or organisation to break out of the feedback loop and start again with selecting all relevant data rather than just that that makes it through the unconscious filters developed over time. I provided anecdotes about how personality theory, heuristics, the ladder of inference and the reframing process have been successfully used in my own project work over many years. In particular the turnaround of the SES response to disaster recovery following Cyclone Yasi due to a successful reframing of the situation is one of the highlights of my career. Reframing has proven its value to me as an individual, when working with small groups and in changing the response to a major disaster by a State government. I am convinced. Reframing will be an essential part of my toolkit for the rest of my career.

(2775 words)

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