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Dancing with the Giant

The Playmaker Influence Decision System: Challenging the Symmetric Paradigm with an Industry-Tested Periodic Table of Influence Strategies

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Introduction

This feature article describes The Playmaker Influence Decision System, a patented table and ontology of 24 irreducibly unique stratagems, likened by its architect and the author, Alan Kelly, to exhaustive frameworks in chemistry, biology, and music. The system, which allows users to definitively decode, define, and anticipate the plans and programs of communication and influence professionals, is detailed through accounts of the author's encounters with Dr. James E. Grunig, the communication scholar and principal author of *The Excellence Theory* among other seminal works. Included with this article is a video series featuring a moderated debate between Kelly and Grunig.

What's a "Play"?

A play is an irreducibly unique stratagem that people and organizations employ to advance their point of view, from the preferred win-win to the zero-sum game. It's the plan we put in place to manage relationships and reputation. It's at the root of recent efforts to activate values and corporate character. It's what we do to convert an earned trust into a decided behavior. Plays are everywhere, like radio waves, and if your work involves the management of communication, social media, marketing, sales, politics, military information operations, or other functions of influence, then you are a practitioner of such things. Here is the definition of a play with three examples from business, politics, and popular culture:

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Influence play /infloōəns plā/ n. ***A stratagem, irreducibly unique, employed by a person, organization, or surrogate to improve mutual or competitive advantage through methods and means of influence. (Syn. play, influence strategy, influence stratagem).***

SYMBOL STEALER. IBM uses the Screen (SN) play to drive its Smarter Planet brand campaign. From its Euro-cool software engineers solving Stockholm's traffic problems to its big-hearted data scientists making health care more efficient, Big Blue owns the idea of 21st-century corporate intelligence. But that's not the half of it. Through the Screen, IBM insinuates—subtly and indirectly—that other IT companies *aren't* as smart. The desired effect is to position its brand as preeminent and reposition its rivals as less so. It is not how IBM likes to talk about its mode and motives, but the play reveals the company's aptitude for tilting the competitive playing field.

ATTENTION GETTER. Pick a public figure and ask yourself, *Why is this person always in the news?* The answer often is found in the Peacock (PK) play, a stratagem that puts the playmaker at the center of the public's attention. Think of the pop star Lady Gaga and the "meat dress" she wore to the 2010 MTV Music Video Awards. Or think of President Ronald Reagan, who in 1986 stood with seven million people in support of the Hands Across America homeless charity. The singer and the late president both might insist that higher-minded motives are at stake, but their underlying strategy—to stun and stunt—is all too clear.

REALITY SHIFTER. After placing second in the 1992 New Hampshire primary to Massachusetts Senator Paul Tsongas, Bill Clinton claimed that Tsongas *ought* to have won given the two states' geographic proximity. "Second place was just as good as winning," said the Arkansas governor, a wily Recast (RC) he would soon repeat from the Oval Office. When the 1994 Republican revolution tipped power to the GOP, President Clinton remade himself into a moderate. From welfare reform to free trade, he pivoted to the center. Politicos won't usually cop to such metamorphoses, yet the strategy is table stakes in politics.

For all the attention that academics and professionals give to mutuality, relationships, reputations, and intangible assets—such as trust, authenticity, and character—we are both slow and hesitant to describe the underlying strategies that every communicator employs, consciously or with deliberation, wisely or not, to manage and influence these amorphous properties. *Influence strategy*, to coin a phrase or perhaps a discipline, is common to all forms of influence, particularly communication. Its elemental stratagems are those plays we run on and run with our cultivated publics and stakeholders, usually with honorable and mutual intentions, but not always.

Irrespective of motive and use, influence plays are the strategies that get us to where our clients and employers wish us to go. As well, they are the strategies that allies, enemies, and fence sitters employ to cajole, co-opt, or cut away our reasonable resistance. They are, like atomic elements and species, the most basic organizing units of our growing field, different, however, from chemistry and biology insofar as their existence is still hardly a standard by which to manage and measure such things and that they lack the hard edges of physical sciences.

What I am determined to know is what these plays are; how they affect one another; what makes them effective, useless, condoned, or criticized; and how and to what ends they can be harnessed and managed for their powers. Without this knowledge, communication as a practice and applied science will be underserved as academics and practitioners proceed headlong into our certain and maturing Age of Influence.

Grunig's Challenge

In this effort, I have met with numerous business leaders and academics and acquainted myself with myriad theories. But no one and no body of work has had the stopping power of Dr. James E. Grunig and his Excellence Theory, particularly his research on the normative and positive properties of symmetry. In 2004 I was honored to receive an invitation from Grunig to present to his University of Maryland graduate seminar an incubating version of my strategy framework—what I then described as *The Playmaker's Standard* and what has since evolved into a patented decision system and ontology called *The Playmaker Influence Decision System*, viewable here.

My talk focused on The Standard Table of Influence Strategy, the cornerstone of this developing work. It was met with interest and skepticism. To Grunig and his students, the taxonomy was provocative but incomplete, even regressive some felt, for the principal reason that it did not comply with the tenets of excellence theory. Looking at the two dozen influence strategies of my table—which in practice I have nicknamed *plays*—Grunig asked, "Where are the collaborative plays?" He saw no evidence of the concepts that to him are critical to professional excellence: Two-way symmetry or, as practitioners might think of it, mutuality and fairness (see Figure 1).

Thus began a kind of dance with an academic giant, Dr. Grunig, on the fit and functions of our respective theories. Does the Playmaker model expose or edify excellence and symmetry? Does it dislocate or just better describe the paradigm of mutuality so widely embraced by professors and practitioners of communication? To his credit, Grunig was open to discussion and debate.

Figure 1. The Standard Table of Influence. A taxonomy of the 24 most basic stratagems in communication, social media, marketing, sales, politics, and the military, among other influence functions. What might be called the first periodic table of influence, it identifies, describes, and classifies irreducibly unique strategies of influence. Click here to access an interactive version of the table and its supporting ontology. Readers may enter the token "**ijoc**" for full access.

What I have concluded is that collaboration, as conceived by Grunig, is the result of how a play is applied, not how it is defined; it is the *player*, not the *play*, that determines the directionality and symmetry of its use. The 24 influence strategies of my system are first and foremost descriptive of what is present, *not what is preferred* or even proven to be most effective. As such, they are agnostic to litmus tests for such things as mutuality, consensus, understanding, ethics, and collaboration. Like a discrete species or chemical element, each play has survived a rigorous and repeating process to confirm its existence and irreducibility (see Figure 2).

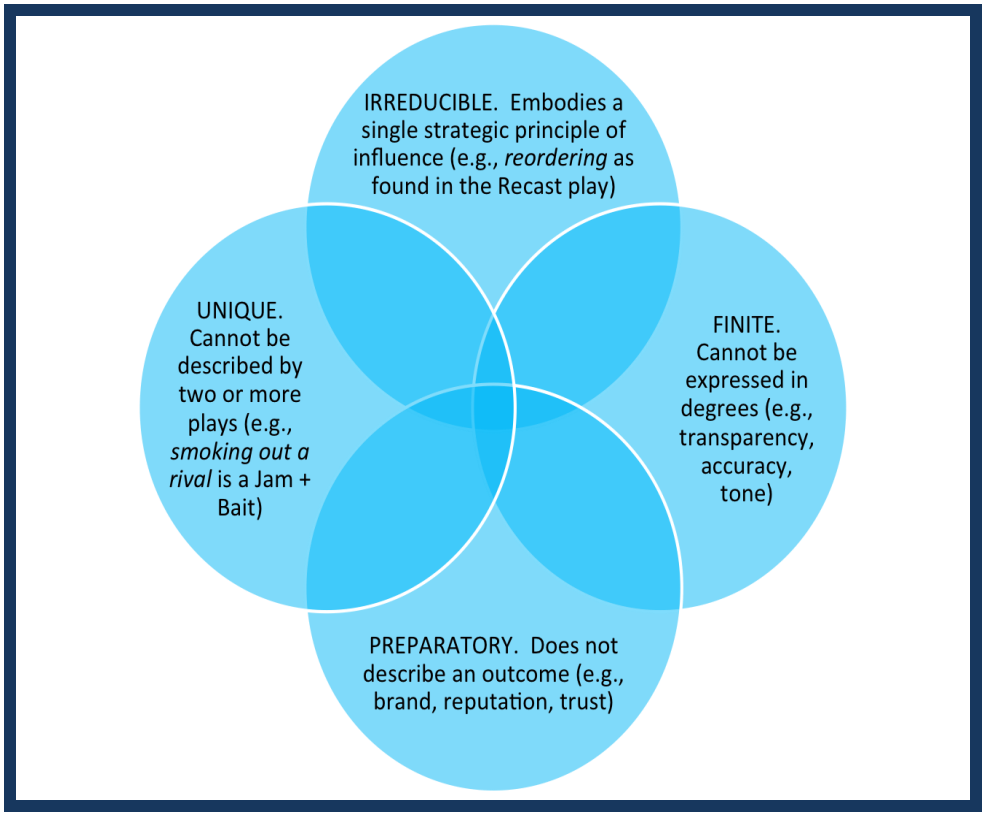

Figure 2. Qualifying criteria. Stratagems of The Playmaker Influence Decision System must be unique, irreducible, finite, and preparatory.

None of the currently 24 stratagems have been discounted or promoted for any observable qualities of mutual or self-interest, much less symmetry or asymmetry. Of course, such things are rooted in social science, so their identification is arguably more akin to calibrating the bands of the electromagnetic spectrum than to naming physically and unarguably distinct things such as molecules or mammals. Even so, the first purpose of my work has been to describe, name, classify, and explicate these most basic operating units used by practitioners of influence and communication, particularly to produce a system that can be easily learned and universally applied.

Initially unable to resolve Grunig's challenge, I published the first-generation Playmaker system in 2006 (Kelly, 2006). But the scholar's concerns were echoed when in 2008 Witold Henisz, an associate professor of management at The Wharton School, observed that the system's orientation was notably bilateral. It was too much about player A versus player B than players C, D, or E, he offered—more like McDonald's and Burger King than McDonald's, moms, and FDA regulators. What accentuated this binary quality were the scores of prescriptions, options, and tips in the initial version that helped users of the system bend or blunt each play, point-counterpoint style, not build consensus (see Figure 3).

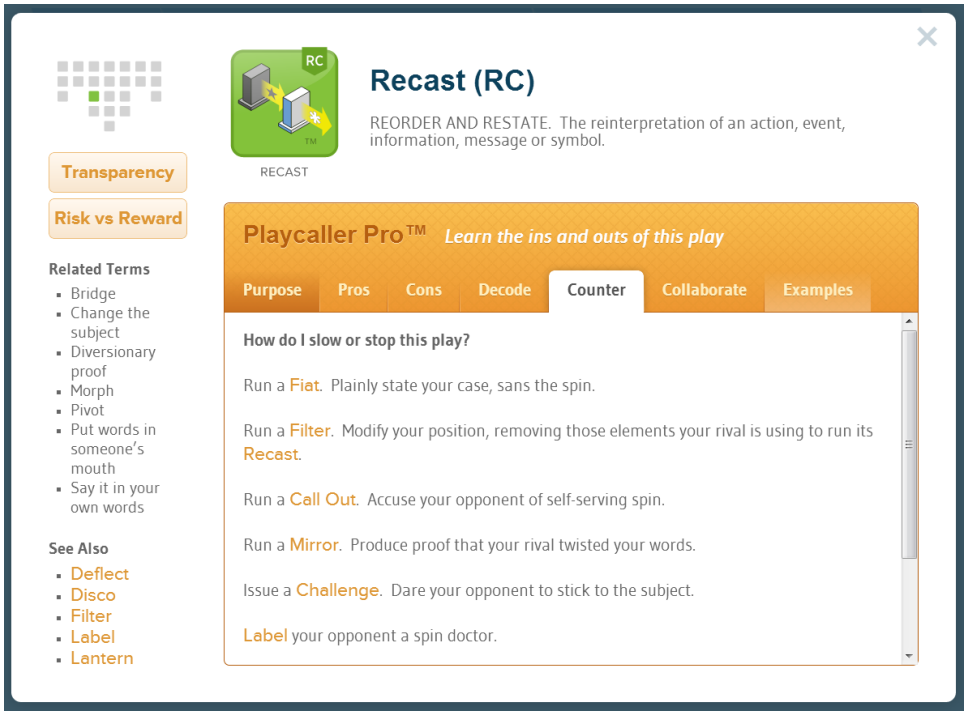

Figure 3. Countering recasters. Shown is a screen image of the online information card for the Recast influence strategy. The selected "Counter" tab lists plays that a marketplace player may employ to counteract a Recast. Click here to access, and use the token "**ijoc**" for full access.

Although the 1.0 system was capable of helping a player fend off or fight back at an opponent, it offered little guidance to players seeking to help one another or more subtle combinations thereof. So I reengaged in my research, eventually adding to the system a full complement of guidelines for supporting, accelerating, and, indeed, collaborating with the plays of any particular allied or independent player (see Figure 4).

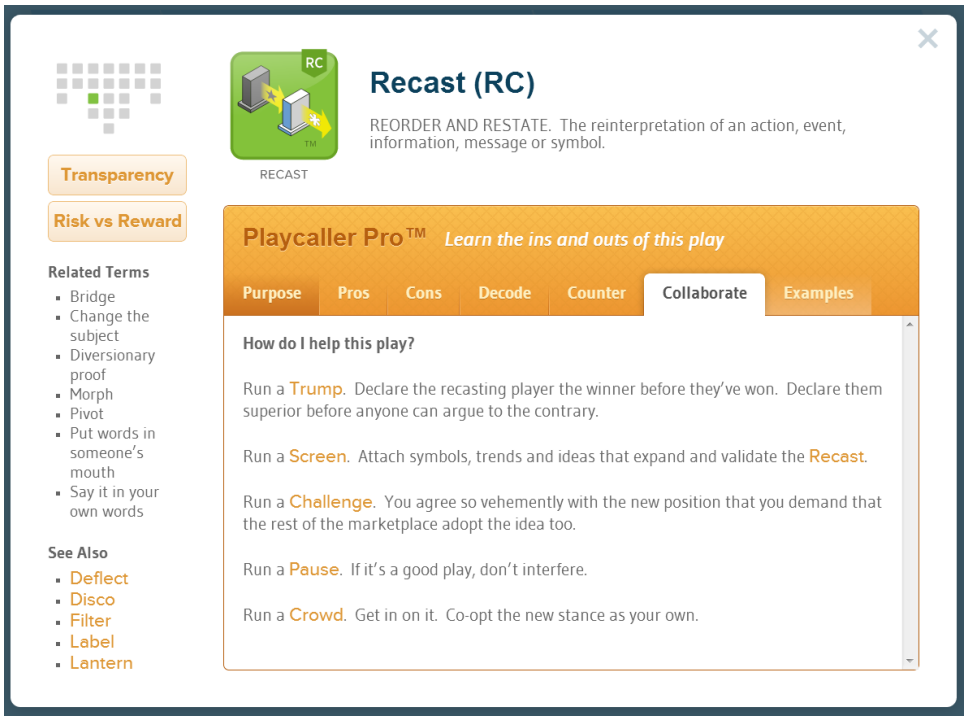

Figure 4. Collaborating with recasters. Related to the Counter plays shown in Figure 3, this screen image lists collaborative strategies that a player may employ to support or accelerate an ally's Recast play. Click here to access, and use the token "**ijoc**" for full access.

I hoped this enhancement would meet Grunig's standard, but it didn't yet satisfy the shortcomings that Henisz saw. To expand the system from its A-versus-B orientation, I began to look for multiplayer conventions that could mimic the complexity of real marketplaces. By chance, I became acquainted with Mark Herman, a senior executive of the consultancy Booz Allen Hamilton and a coauthor of *Wargaming for Leaders* (Herman, Frost & Kurz, 2009) who introduced me to the U.S. Department of Defense wargaming model. This is an elegant, four-sided structure of blue-friendly, red-rival, green-ally, and gray-independent player types that helped me evolve a supporting process system called Cycles of Influence (see Figure 5).

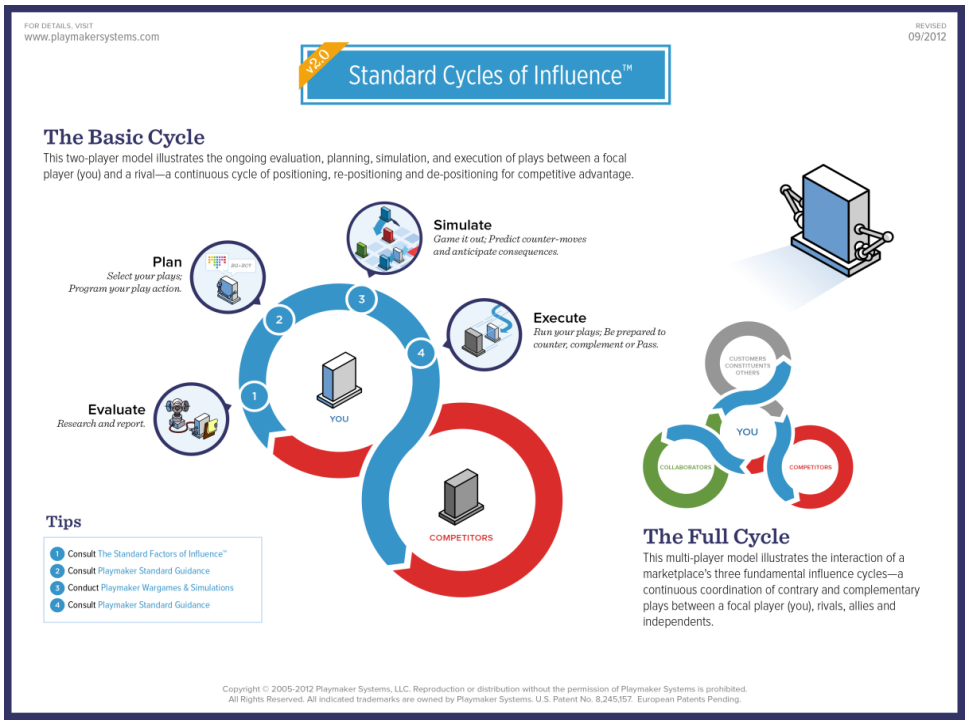

Figure 5. Multiplayer model. Shown are two process models, the Basic Cycle (left), which illustrates bilateral interactions of two players, and (right) a superset four-player trilateral model. Called the Full Cycle, this multiplayer process conceptualizes the continuous flow and interplay of influence strategies between a focal player (blue), surrounding collaborators (green), competitors (red), and independent customers and constituents (gray). Click here for details.

With the benefit of six years of testing with Fortune 100 corporations and instruction at major universities, I finalized in mid-2012 the 2.0 system, complete with 1,004 guidelines, including the collaborative elements described above. This revision is documented in a white paper, *An Evolution in Influence: The Playmaker Influence Decision System 2.0* (Koval, 2012).

When I presented this work to Grunig, he suggested that I had again missed the mark. His problem with my theory was its focus on *influence*. He saw the plays as asymmetric devices for persuasion, not collaboration, and not suited to the proper cultivation and maintenance of good and balanced relationships—his requisites for communication excellence. Below are two possible exceptions:

IS BAITING SO BAD? It depends on the perspective of the player (i.e., the actor to whom a play is ascribed). The Bait (BT), for example, defined as the provocation of a player to act against its self-interest, is capable of provoking an emotional rather than rational response. Does that make it asymmetric? In many cases, yes, though the actor who Baits another might argue otherwise. Think beyond the cajoling dealmaker, dictator, or preacher and instead imagine the peace negotiator who seeks to draw a self-destructive activist toward a face-saving position. The negotiator's Bait (it might also be a Challenge), while technically imperious, is rooted in concern for the target's welfare.

IS SELF-DISCLOSURE SO GOOD? Take, as another example, the Lantern (LN), one of five strategies that influencers and communicators may use to slow or stop a message or meme. This play, which preemptively discloses a flaw, mistake, or potential controversy, is quite different from the Bait because it engenders trust and builds credibility. Is a Lantern asymmetric? Usually not, but think of the journalist whose planned exposé of a corrupt official is suddenly muffled by the public figure's savvy Lantern. The reporter is sure to feel stung.

While Grunig's research indicates that symmetric approaches are universally more effective—normative and positive, he contends—my observations suggest that symmetry is more subjective than categorical and, in fact, not universally more effective. As in so many things, the merits, morals, and ethics of plays are often in the eye of the beholder (Grunig & Grunig, 1996). And because of the certain infatuation for sentiment, reputations, brands, and relationships, we are as a community of scholars and practitioners overlooking, even seeming to wish away, the merits of plays that are or may be directionally biased but might in fact have constructive uses. Whether as researchers or professionals, we are today more like chemists mixing compounds with half the available elements or musicians performing a piece with half the keys of their instruments. We are half as wise, productive, and creative.

Balancing Fit with Friction

Because some elements of the Playmaker theory might be eschewed by influencers and various professional codes of ethics, I am keen to remind academics and professionals that my system is based on observation and 30 years of professional experience. It was conceived when the software magnate Larry Ellison, CEO of my client, Oracle Corp., declared at a prestigious technology conference on September 4, 1995, "The PC is a ridiculous device." His play was a Call Out (detailed in Figure 6), aimed at no less than his rival, Microsoft's Bill Gates. The strategy behind Ellison's mean-spirited message was employed instinctively, but it nonetheless describes the CEO's intention to mock or direct moral indignation at a player or its position—in this case, a legendary tech entrepreneur and his juggernaut PC software company.

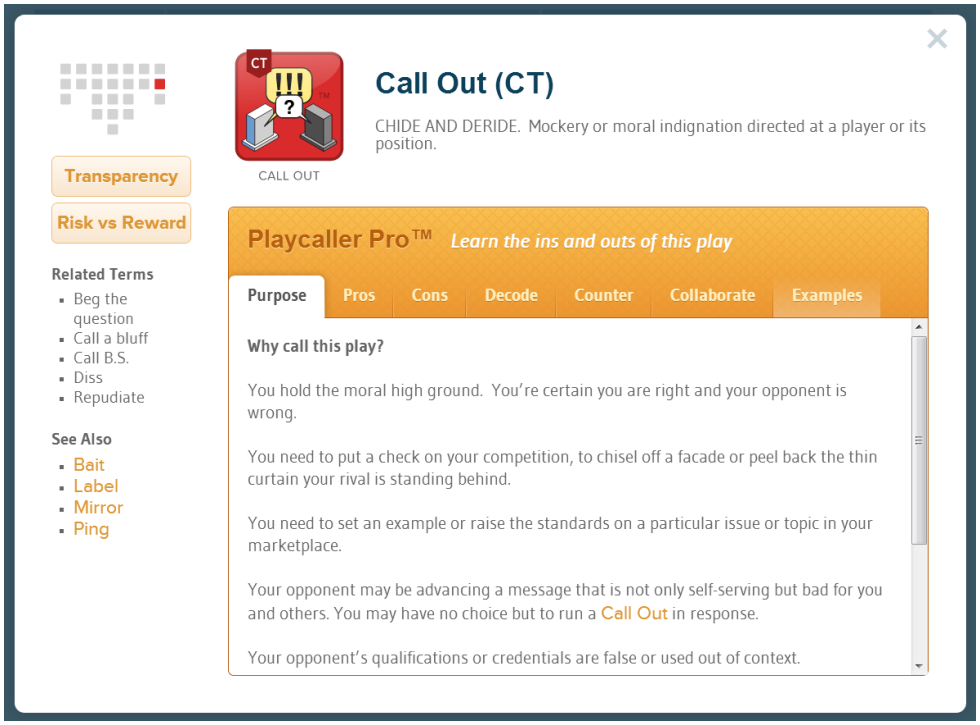

Figure 6. Chide and deride. Shown above is a screen image of the online information card for the Call Out influence stratagem. Click here to access and use the token "**ijoc**" for full access.

Call Outs are caustic, not gentle, and certainly they are one-way and asymmetric in the extreme. But irrespective of motive or manner, the Ellison-on-Gates play was impossible to ignore, like a microbe under an early microscope. Ellison's Call Out—a play that helped derail a monopoly and spur a new era in computing—was eventually classified as one of three high-engagement provoking plays and rated 7 on a 1-to-9 transparency scale. Twenty-three others would follow, most being given to more symmetric uses than Ellison's over-the-top and unavoidably obvious Call Out.

As Grunig points out in his "Furnishing the Edifice" article (Grunig, 2006), every theorist is brought to and then jailed within his or her preferred theory. I am no exception. Being professionally born and bred in Silicon Valley, the objective I have typically pursued with my clients is to help them develop their markets and to achieve influence and advantage in them. Accordingly, my view of communication is that it is ultimately a competitive function, informed by the reality of free markets and guided by rules for free and fair competition. But having consulted outside of technology for nearly a decade, I see substantial similarities in established markets, profit and not-for-profit, foreign and domestic, and particularly in the pharmaceutical and energy industries and the political processes of my current backyard, Washington, DC.

Is collaboration a communicator's imperative? Are relationships, also a favorite focus of leading academics and consultants, the organizing principle of all plans and programs? Not always (Leichty, 1997; Murphy, 1991), and this is where the Playmaker system differs from traditional communications and marketing models. The intangibles described earlier—relationships, reputations, trust, authenticity, and character—while key, are only broad *strategies* for achieving competitive advantage; they are emphatically not equal to the more fundamental objective of competitive advantage. Here is one explanation why:

Whether in the course of promoting and socializing microprocessors, new drugs, alternative fuels, or new laws, it is often as necessary to find what I call *friction* as it is to find *fit* in the positioning and messaging of both innovations and big ideas. Debate and even disagreement are the lifeblood of relevance, and that, of course, is an important driver of the all-important outcomes of interest and behavior. What would Pepsi be without Coke? What would Obama be without Boehner? What would Greenpeace be without Chevron? In other words, one can't always *mutualize* one's way to success because the merits of collaboration, and even sacredly held relationships, have limits. Sometimes they are better used as foils against which propositions may be argued and advanced. Grunig contends that, in the end, such policies backfire, but this is not my experience. Excellence is the by-product of a full and informed use of the strategy spectrum. When and if such research is performed with practitioners who are fully versed in all the plays, not preferred subsets, we will see that asymmetric strategies are also effective.

Some scholars and many corporate communications chiefs, particularly leaders of the Arthur W. Page Society of which I am a member, project a laudable vision of communication and its applications. Aspiring works, such as the Page Society's *Authentic Enterprise*, which undergirds a so-called *New Model,* are centered on communication's ability to build trust and activate shared values and character (Arthur W. Page Society, 2007, 2009, 2012). But what they avoid and appear to suppress is the most powerful capability of communication: to influence publics and advance for relative competitive advantage a player's agenda. This is the game I have observed and whose units of practice my system describes. This is the game that seems systematically neglected or ignored. Yet this is crucial to what keeps practitioners in their positions of importance and, as Grunig hopes, in a strategic management capacity.

While I am appreciative of the theories of symmetry and co-orientation (McLeod & Chaffee, 1973). contingency theory of accommodation (Cancel et al., 1997), relationship cultivation strategies (Hon & Grunig, 1999), and other related works, none adequately describes what I observe as the ultimate application and actual use of communication in business, government, and society. These theories under-describe and over-prescribe the moves and motives that inform the certain games of communicators and influencers. They appear morally blinded to the endgame of communication, and thus they evade its highest and ultimate benefit—competitive advantage—and its most basic nature—to influence.

It may be impolitic to academics and some well-intentioned professionals to place communication in the context of influence and competitive advantage. It also may be unwelcome or uncomfortable to expose and propose for public consumption base strategies of applied communication as well as other functions such as marketing, sales, public affairs, or law. After all, the root of these practices is made of the most volatile stuff and hobbled by its history, the motivation to manipulate, and the legacy of

propaganda. That is perhaps why we are happy to research and explore for consensus and understanding and to be less transparent about the other side of the coin. Whatever it may be, however, we do not serve our professions or publics well by masking what is elemental and what is widely practiced, even by noble players.

Can the Playmaker system be modified to accommodate symmetry? It does. Each information card of the system lists notable benefits and deficits (see Figures 3 and 4) and principal purposes for employing a play (see Figure 6). Like a pill bottle's warning label, each play is rated for its transparency (i.e., the degree to which it is detectable) and levels of risk and reward. With these metrics, users of the system can easily determine the certain directionality and symmetry of a considered play and apply or avoid it accordingly.

Can more be done to flag users to asymmetric plays? Yes. One possibility is the introduction of a kind of traffic-light feature where a green, yellow, or red circle is embedded into each play icon to signal its degree of self-interest or ethical character.

Can a taxonomy or full ontology be developed that only describes symmetric stratagems, such as cultivation strategies like access, openness, and disclosure? Yes, but like the banning of books, its adherents will only know what plays they prefer and be blind to the plays they don't. Lest students and professionals spike their own punch, a companion system of asymmetric stratagems would also have to be built to balance understanding. That, of course, is what now constitutes The Playmaker Influence Decision System.

Conclusion

Strategy is no longer monolithic. My theory and vision of strategy speak to the possibility that there is an entire system of stratagems heretofore unexplored and undocumented that are different from conventional operational strategies and, in fact, basic to the processes of communication and influence. It informs our progression from industrial economies to creative societies, where the plans and ploys we use to manage what is tangible—from battleships to potato chips—are now the plays we run to manage what is utterly intangible but undoubtedly valuable, like reputations and brands.

The arc of professional influencers is impressive; they are becoming the stewards of the new economy's assets. To understand their work, to be fully transparent with the stakeholders they endeavor to involve, and to realize their potential, they will need new theories and systems that describe without bias the spectrum of influence and the specific and irreducibly unique organizing units that underlie it, from the ill-gotten to the high-minded. We have been blessed by scholars and professionals dedicated to the effective and ethical application of influence. And now we are ready to know more.

Resources

Listed below are companion videos featuring Kelly and Grunig in a moderated discussion, taped October 26, 2012, at the University of Maryland.

Full Video (58:24)
http://www.youtube.com/watch?v=ziKnGwvHL5Q&list=PLWIFF7JCLmknnMNolYJVwe-_rQS9An3Qt

Segment 1 (5:30)
http://www.youtube.com/watch?v=-s3ir7z_NWc&list=PLWIFF7JCLmknnMNolYJVwe-_rQS9An3Qt&index=2
Playmaker System Overview (0:00–2:16)
Development of The Playmaker System (2:17–5:30)

Segment 2 (7:38)
http://www.youtube.com/watch?v=OEAWrEsbQGs&list=PLWIFF7JCLmknnMNolYJVwe-_rQS9An3Qt
Collaboration and Co-orientation (0:00–3:29)
Asymmetry, Self-Interest, and Listening (3:30–6:04)
Ontologies in Social Science, Irreducibility, and Cultivation Strategies (6:05–7:38)

Segment 3 (19:38)
http://www.youtube.com/watch?v=TcvCbItjqC8&list=PLWIFF7JCLmknnMNolYJVwe-_rQS9An3Qt
Tech Industry's Plays and the Apple Map App Case (0:00–5:19)
Collaborative Plays in Pharma and Energy (5:20–7:24)
Competitive Advantage, Relationships, and Measurement (7:25–15:39)
Finding Foils to Drive Discussions and Political Campaigns (15:40–19:38)

Segment 4 (10:09)
http://www.youtube.com/watch?v=Rrmi2pjpIA4&list=PLWIFF7JCLmknnMNolYJVwe-_rQS9An3Qt
Positive and Normative Characteristics of Influence Plays (0:00–2:59)
Standard Cycles of Influence and the Role of Research (3:00–6:24)
Symmetry and Digital Media, Public Interest, and Mutual Behavior (6:25–10:09)

Segment 5 (12:32)
http://www.youtube.com/watch?v=42lmDLw98CI&list=PLWIFF7JCLmknnMNolYJVwe-_rQS9An3Qt
Ethics, Risks & Rewards, and Calibrating the Playmaker (0:00–4:29)
Machine Readability, Translations, and Cultural Variation (4:30–8:39)
Adding a Symmetric Dimension (8:40–12:32)

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