

Simplify and Connect

One great way to create metaphors is a technique I call “Simplify and Connect.” It has two parts: first, you take the complicated concept you’re trying to understand through metaphors, and you reduce it to one or two key features. This makes it easier to understand and it also allows you to create vivid metaphors that make the ideas more memorable. The second part is that you take those one or two features you’re focusing on and try to find a situation that just describes those one or two features. That’s much easier to then try to create a metaphor that perfectly describes a very complicated and intricate system. Better, it provides a starting point you can expand the metaphor to help understand and explain more of the target idea.

So let’s walk through one example. In this example I’m going to talk about the financial concept of annuities. Now, an annuity is basically like a mortgage—you borrow a lot of money at once and then you repay it in equal installments over a period of months and years. Now, it’s a fairly complicated idea, too; There’s a lot of formulas and it applies to a lot more than just mortgages. It applies to savings and bonds and a lot of different financial situations, but let’s just focus on one key feature of the idea by simplifying it so it will be easier to create a metaphor.

So the one key feature I want to focus on here, of annuities, is that there’s an imbalance. In the beginning, even though you’re paying the same amount, you’re mostly paying interest; Most of your equal payment installment is interest payments. And at the end you’re mostly paying principle, and the reason for this is at the beginning you still owe a lot of money so you have to pay a lot of interest just to keep that loan. And in the end, you’ve paid back most of the loan, so you’re mostly repaying the principle.

So now that I’ve simplified the complicated concept of annuities down to the fairly simple idea of an imbalance between interest and principle repayments, I can create a metaphor. Now, a metaphor that I came up with to describe the situation is a man walking carrying a bag of coins, and the bag of coins has a small hole in the bottom. So as he walks, coins slip out of the bottom. The distance he walks is like the principle repayment. In the beginning, it’s hard to walk very much distance even with the same amount of effort because he’s carrying this big bag of coins. This is similar to the loan that you still owe, creates such an interest payment that you can’t really repay much of the principle in the beginning. But as you make more distance and more coins fall out of the bag, it becomes easier and easier to walk, until near the end when there’s very few coins left in the bag and you can make a lot of distance.

So this is a fairly simple analogy, but it helps you visualize and keep the metaphor more vivid of this simple idea. Now, you could expand it to try to cover more concepts of annuities, try to change up the situation, but it’s a starting point to create a metaphor for your understanding.

So try this idea: Simplify your idea down to one or two key features and connect it to a metaphor that just describes those two parts, but allows you an opportunity to expand it to explain more of the idea and create more connections.