

# Diagnosing Organizational Identity Beliefs by Eliciting Complex, Multimodal Metaphors

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## Abstract

The purpose of this article is to extend the organizational development diagnostics repertoire by advancing an approach that surfaces organizational identity beliefs through the elicitation of complex, multimodal metaphors by organizational members. We illustrate the use of such “Type IV” metaphors in a postmerger context, in which individuals sought to make sense of the implications of the merger process for the identity of their organization. This approach contributes to both constructive and discursive new organizational development approaches; and offers a multimodal way of researching organizational identity that goes beyond the dominant, mainly textual modality.

## Keywords

organizational identity beliefs, organizational development diagnostics, multimodal metaphors

## Introduction

The purpose of this article is to extend the organizational development (OD) diagnostics repertoire by advancing an approach to surface organizational identity beliefs by eliciting complex, multimodal metaphors by organizational members. Organizational identity beliefs refer to shared understandings concerning organizational aspects that

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its members deem central, enduring, and distinctive. As a collectively held concept of self, organizational identity matters for organizational change. Because fundamental change is likely to affect some of the deeply held organizational identity beliefs of its members, a misreading or even neglect thereof might hamper effective change (Nag, Corley, & Gioia, 2007). Thus, change-related OD practice can be expected to benefit from an approach that allows for an effective and practical diagnosis of organizational identity beliefs as a desirable step prior to initiating larger scale OD interventions.

Organizational change is also an occasion for organizational members to prospectively make sense of an uncertain and ambiguous future. In organizational analysis, it has been suggested that metaphors may effectively facilitate as well as shape sense-making (Cornelissen & Clarke, 2010), especially in the context of change (Cornelissen, Holt, & Zundel, 2011). We propose a categorization of current approaches to metaphors in terms of their modality (monomodal vs. multimodal) and origination (preexisting universal metaphors vs. particularistic, situative metaphors). In terms of mode, most approaches to date draw on a single, often textual modality, although multimodal approaches have recently emerged as a phenomenon of interest (e.g., Heracleous & Jacobs, 2008, 2011). Regarding origination, it is important to distinguish between metaphors drawn from a pregiven, universal set of metaphors (e.g., Marshak, 1993; Morgan, 1986), and those generated situatively by organizational members (e.g., Oswick & Montgomery, 1999). Mapping those two dimensions in a matrix, we find that multimodal, situatively generated metaphors (which we refer to as "Type IV") present a promising yet sparsely populated diagnostic approach for purposes of organizational analysis. Hence, the question we explore in this article is, *How can Type IV metaphors facilitate the surfacing and diagnosing of organizational identity beliefs?*

In this article, we outline the generic process of an OD intervention that explicitly elicits Type IV metaphors in diagnosing organizational identity, and illustrate this process by describing a workshop session at CellCo, a mobile telephony provider that had recently been acquired by a major competitor. In particular, we show how the elicitation approach induces complex metaphorical mappings by participants that in turn lead to fine-grained and nuanced emergent meanings about the respective change process. These collectively created compound metaphors allow for a nuanced understanding of participants' organizational identity beliefs as well as dimensions of centrality, distinctiveness, and endurance of these beliefs. We conclude with a discussion of implications for diagnosing organizational identity in OD processes, for OD diagnostics in general, and for organizational identity scholarship more broadly.

## **The Need for Understanding Organizational Identity Beliefs in OD Practice**

Organizational identity matters for organizational change. In many cases, fundamental organizational change is perceived as threatening to organization's collectively held self-concept of "who we are as an organization" (Dutton & Dukerich, 1991; Nag et al., 2007). Building on our social constructionist orientation to organizational identity, in

this article we refer to and draw specifically on the concept of *organizational identity beliefs*, defined as “members’ beliefs about what an organization is and stands for” (Ravasi & Phillips, 2011, p. 104). Since organizational identity beliefs are “likely to influence any attempt to transformative strategic change” (Nag et al., 2007, p. 824), we can expect such change to engender skepticism or even resistance (Gustafson & Reger, 1995). In terms of the main origins of such resistance, Schein (1990) reminds us compellingly that “just as individuals do not easily give up the elements of their identity or their defense mechanisms, so groups do not easily give up some of their basic underlying assumptions” (p. 116). Consequently, Ravasi and Phillips (2011) call for active “identity management” in this respect since “if not properly managed, organizational identity may [ . . . ] hamper strategic change” (p. 104).

The field of organizational identity has been heavily influenced by the concept’s original definition (Albert & Whetten, 1985), with a great deal of subsequent scholarship focused on identifying an assumed set of *central*, *enduring*, and *distinctive* attributes of an organization. Although this initial definition has provided considerable guidance to study of the topic, the organizational identity field has gradually evolved to encompass a plurality of perspectives that span a variety of ontological and epistemological viewpoints, which have given rise to a multiplicity of research methodologies and designs (Corley et al., 2006).

While some scholars have focused on the enduring or essential features of organizational identity (e.g., Elsbach & Kramer, 1996; Riantoputra, 2010), others have problematized these features, proposing that essentialist claims can be thought of as—at best—stabilizing moments in an ongoing process of identity formation and re-formation (Ybema et al., 2009). From this perspective, organizational identity is not an objective, enduring characteristic of an organization so much as a “temporary, context-sensitive and evolving set of constructions” (Alvesson, Ashcraft, & Thomas, 2008, p. 6), concerned with fundamental beliefs with respect to the collectively held concept of self. We acknowledge these perspectives on organizational identity, believing it to be to be socially constructed, ambiguous, contested, and contextual, which has led us to focus on the more specific notion of organizational identity beliefs as an analytical category.

However, as individual identity informs the way we conceive of ourselves as different from others in ways that may or may not persist over time, that is, our uniqueness (Olson, 2003), anecdotal evidence from the field indicates that organizational members frequently hold beliefs about their organizations’ central, enduring, and distinctive qualities. As much as we as scholars might dislike the supposed “ontological and conceptual inconsistencies” of our informants, they in fact tend to use phrases such as “in essence” or “in the end” to denote pivotal aspects of their identities; phrases such as “we have been mandated to” or “our quasi-eternal purpose has been” to denote persistence and “to my knowledge, nobody else has this capability” or “we are so far the only ones to operate this way” to denote distinctiveness. Hence, it is with this disclaimer—and emphasis on our social constructionist commitment—that we adapt and reinterpret Albert and Whetten’s (1985) categories to structure our data on organizational identity beliefs. Such fundamental and under normal circumstances

taken-for-granted beliefs in terms of centrality, distinctiveness, and endurance are likely to be threatened during processes of organizational change. Therefore, having a means to surface, debate, and diagnose identity-relevant beliefs becomes an essential aspect of effective organization change.

Identity questions are particularly salient in cases of major organizational changes such as mergers and acquisitions, in which organizational boundaries are explicitly changed and a dominant partner may subsume the other party. Mergers and acquisitions are occasions that can reactivate previously unresolved issues related to organizational identity (Kovoor-Misra & Smith, 2008), and perceived differences in espoused (identity-relevant) values between the acquirer and acquired firms can negatively affect the resultant performance of the combined firm (Daly, Pouders, & Kabanoff, 2004). Diagnosing identity dynamics related to mergers and acquisitions may improve an OD practitioner's ability to understand the sensemaking frames used by acquired managers, which have been found to affect these managers' ability to adopt new roles in the combined firm (Chreim & Tafaghod, 2012).

One needs to look no further than the number of organizations that have fundamentally altered their core businesses as well as their identities extensively to understand that these concepts are frequently intertwined. 3M shifted from being a mining and sandpaper company to a technology-oriented company operating in transportation and health care while Samsung moved from being a grocer and noodle maker to becoming a technology, shipbuilding, and engineering conglomerate (Economist, 2011). Even though such fundamental changes in core business and identity do not guarantee continued success in fast-moving markets, as Nokia has recently discovered, such changes frequently characterize corporate evolution over time, and in the process challenge established organizational identity beliefs.

Thus, for OD scholars and practitioners, diagnosing organizational identity beliefs seems crucial for designing and delivering effective organizational development interventions and providing guidance throughout the change process. In other words, OD practice would benefit from understanding organizational identity beliefs—what organizational members deem *central*, *distinctive*, and *enduring* about their organization—prior to suggesting or implementing any change interventions. We turn now to discuss one effective and pragmatic approach to diagnosing organizational identity through metaphor, which is both multimodal as well as specific to the change situation.

## Metaphors in Organizational Diagnostics

Organizational change has been viewed as an occasion for inducing organizational members to prospectively make sense of an uncertain and ambiguous future (Gioia & Mehra, 1996; Judge, Thoresen, Pucik, & Welbourne, 1999; Rafferty & Griffin, 2006). As a type of analogy, metaphors have been suggested to facilitate such prospective sensemaking (Cornelissen et al., 2011) since they convey “relationships to concepts already understood” and facilitate “the construction of meaning” (Gioia, 1986, p. 53). Because fundamental organizational change entails a disruption of taken-for-granted categories and their relationships, an important way to construct new ones often

involves developing new “metaphorical frames that can create or expand categories of understanding in order to incorporate change” (Cornelissen et al., 2011, p. 1705).

To provide a conceptual context for our own discussion of the role of multimodal metaphors in surfacing and diagnosing perceptions of organizational identity, we differentiate metaphors in terms of their type (primary and complex), origination (applying universal metaphors vs. eliciting situative metaphors) and modality (monomodal vs. multimodal) and discuss each of these in turn. To begin, metaphors can be characterized as either *primary* or *complex* (Cornelissen & Kafouros, 2008). A primary metaphor consists of “the most basic metaphorical description of a target domain” involving “a single point of correspondence and hence a single entailment between a source and target domain,” for example, “good is up” and “seeing is knowing” (Cornelissen & Kafouros, 2008, p. 962). A complex metaphor refers to a “self-consistent metaphorical complex composed of more than one primary metaphor and hence implies more source domains and more points of correspondence and entailments in relation to the target domain,” for example, “glass ceiling effect,” a complex metaphor for gender workplace discrimination (Cornelissen & Kafouros, 2008, p. 962). Complex metaphors thus involve the fitting together and conceptual blending of primary metaphors into larger wholes. For example, a combination of the two aforementioned primary metaphors would suggest that moving upward to a visible space is hindered by a covert barrier.

Eliciting complex metaphors is useful when exploring identity in the context of change, as such elicitation allows organizational members to imagine and explore novel possibilities by identifying previously unrecognized or unthought-of connections and relationships. Complex metaphors can thus enable creative shifts in the prospective sensemaking of organizational members when faced with fundamental change and uncertainty.

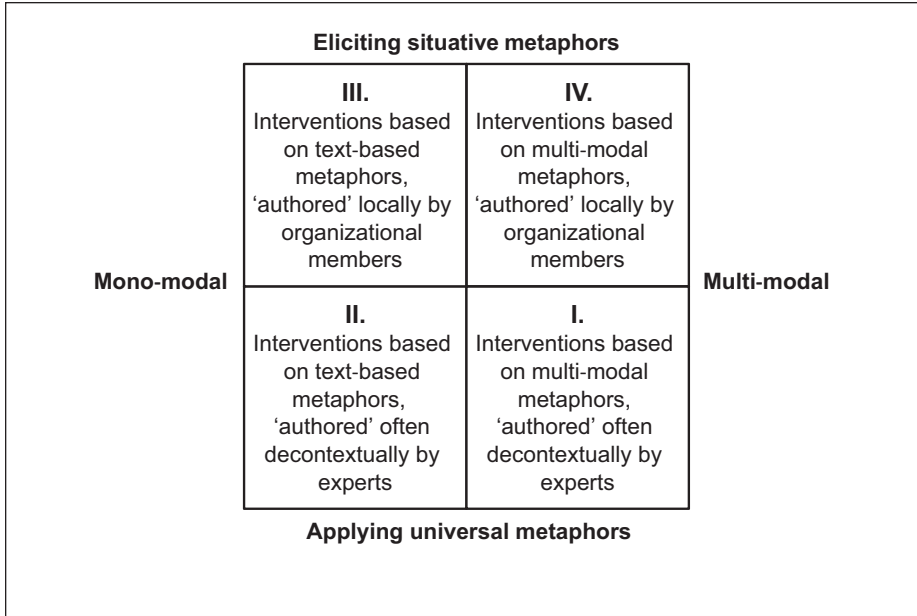
A second important distinction relates to the *origination* of metaphors (Cornelissen, Oswick, Christensen, & Phillips, 2008), that is, who “authors” organizational metaphors, and mobilizes them to create insights. The origination of metaphors has been described as either “deductive” versus “inductive,” or as “applying” versus “eliciting.” For instance, Palmer and Dunford (1996) have observed that “most applications of metaphor-based analysis to organizations involve a deductive approach, in that the emphasis is on illustrating how particular [pregiven] metaphors can be applied to organizational situations” (p. 10). More recently, Cornelissen et al. (2008) distinguished application of universal metaphors from the elicitation of situative metaphors in terms of the origination of the metaphors employed. In other words, whether they originate from a pregiven set of metaphors (e.g., Morgan, 1980, 1986), or from the intersubjective, local meaning negotiations of organizational members. Whereas the application approach of pregiven metaphors has been employed as an “intervention device in groups to ‘unfreeze’ particular established ways of thinking and to elaborate alternative scenarios for an organization,” the elicitation approach identifies “metaphors in the context of people’s language use” (Cornelissen et al., 2008, pp. 9-10), in a natural field setting. While approaches leaning more toward an application approach include Morgan (1980), Marshak (1993), and Barrett and Cooperrider (1990), elicitation

approaches have been advocated by other scholars such as Palmer and Dunford (1996), Vaara, Tienari, and Säänti (2003) and Jacobs and Heracleous (2006).

A final distinction refers to the *modality* of metaphors (Cornelissen et al., 2008). Typically, we tend to take for granted—and thus to not problematize—the dominant use of monomodal, often linguistic or textual form of metaphors. However, Forceville (2006) reminds us compellingly that metaphors are also formed nonverbally or non-textually, as well as in different modalities such as pictorial signs and images, gestures, sound, or music. While monomodal metaphors refer to metaphors “whose target and source are exclusively or predominantly rendered in one mode,” multimodal metaphors refer to “metaphors whose target and source are each represented exclusively or predominantly in different modes” (Forceville, 2006, pp. 381-383). Cornelissen et al. (2008) mobilize this distinction when they call for more attention to modalities other than linguistic or verbal ones since “a metaphor is likely to be cued and represented in more than one mode simultaneously, as metaphoric gestures often coincide with linguistic metaphors, and as sculpted artifacts may extend linguistic metaphors” (p. 14). Although organizational inquiry has traditionally been predominantly concerned with verbal/linguistic metaphors (e.g., Barrett & Cooperrider, 1990; Marshak, 1993; Morgan, 1980; Palmer & Dunford, 1996; Vaara et al., 2003), some scholars have reached out and experimented with multiple modalities including change drawings (Broussine & Vince, 1996), organizational theatre (Meisiek & Barry, 2007), cognitive sculpting (Doyle & Sims, 2002), and embodied metaphors (Heracleous & Jacobs, 2008).

To recap, the collective creation of complex metaphors allows organizational members affected by change to creatively and constructively make sense of an uncertain future, especially when it comes to issues of identity. Figure 1 below charts the terrain of metaphor in organizational analytical approaches in terms of the two dimensions of modality and origination. Quadrant I consists of interventions that use and apply a pre-given multimodal metaphor (e.g., “organization as theatre”) to a specific organizational context (e.g., Meisiek & Barry, 2007). Quadrant II refers to approaches to organizational analysis that use and apply a pre-given, and thus decontextualized, set of text-based metaphors to a specific organization or situation (e.g., Marshak, 1993; Morgan, 1980). Similarly focused on text-based metaphors, Quadrant III refers to analytical interventions that involve solicitation of text-based metaphors directly, and thus locally, from organizational members (e.g., Oswick & Montgomery, 1999; Palmer & Dunford, 1996; Vaara et al., 2003). Approaches grouped in Quadrant IV use interventions that solicit local metaphors authored by organizational members in more than one modality, including change drawings, analogically mediated inquiry and embodied metaphorical mapping (e.g., Barry, 1994; Broussine & Vince, 1996; Heracleous & Jacobs, 2008).

In sum, since fundamental organizational change often poses a threat to what organizational members deem central, distinctive, and enduring about their organization, OD practitioners might benefit from a practical instrument to diagnose organizational identity beliefs effectively *before* selecting and initiating any subsequent OD interventions. When considering metaphors as diagnostic devices, we propose that most such



**Figure 1.** Four types of metaphorical approaches (in terms of origination and modality).

approaches operate predominantly through either a monomodal, text-based approach (Quadrants II and III) or through applying a pre-given, universal set of metaphors (Quadrants I and II). While acknowledging the conceptual and practical relevance of these approaches, we nevertheless believe that a multimodal, Type IV metaphor approach aiming at eliciting situative metaphors merits further exploration. Hence we ask, *How can Type IV metaphors facilitate the surfacing and diagnosing of organizational identity beliefs?*

**Method**

To gain a better understanding of Type IV metaphor use in a context of organizational identity construction, we outline and advance a process intervention with a management team as part of a postmerger integration workshop. We selected this empirical context based on Brown (2006), who suggests that workshops and meetings are primary occasions for organizational sensemaking and storytelling, as well as Vaara et al. (2003) who suggest that postmerger situations are particularly fruitful for studying collective identity building.

The diagnostic OD intervention we describe here aims at eliciting complex, multi-modal metaphors to explore organizational identity. It is based on the serious play technique developed and reported on over the past decade (Buergi, Jacobs, & Roos, 2005; Buergi & Roos, 2004; Oliver & Roos, 2007; Roos, Victor, & Statler, 2004). The

intervention consists of a structured, yet nondirective process of individually and then collectively exploring issues of relevance to the participants (typically in the range of 5 to 15 individuals) using three-dimensional objects such as construction toy materials. The generic process consists of five main steps. First, some familiarization with the material is advised through some so-called warm-up exercises. Then in a second step, each participant is invited to construct an individual model of the organization—the basis for Step 3, namely the discussion and exploration of a joint model of the organization. Step 4 consists in constructing individually, and then collectively, important players in the organization's competitive landscape. Fifth and last, the total model is then drawn on to play out different scenarios and how these might affect the organization and/or its environment (for a detailed description of the serious play process, see Heracleous & Jacobs, 2011, Chapter 9; or Statler & Oliver, 2008).

The constructions that result from this elicitation process are complex metaphors embodied in several modalities. The creation of these structures involves the manipulation of objects, directly engaging the body and resulting in a spatial-material dimension that complements textual or narrative aspects that the process equally surfaces. Content-wise and most pertinent in Process Steps 2 and 3, participants individually and then collectively explore the organization as a direct object of inquiry, and in doing so, discuss what they consider relevant and important (i.e., central), attractive and unique (i.e., distinctive), and temporal aspects (i.e., enduring). In other words, participants explore inductively and by means of complex, multimodal metaphors the organization's identity.

During this process, a facilitator has an excellent opportunity to make diagnostic observations as well as actively probe into artifacts, their meaning as well as the overall interactive process of how they come into being through a collective effort. Most important, an OD practitioner can probe into the elicited final model, investigate the metaphorical mappings, and the source-to-target domain characteristics and interpretations by participants. Perceptions of organizational identity are embedded in these constructions since they are metaphorical representations of perceived identity. The constructions are in effect complex metaphors consisting of a grand metaphor (which is central to the storyline or narrative of what is built, as told by participants) and a variety of constituent metaphors (which are phases or aspects of this grand narrative). The target domain of the grand metaphor is the organization's perceived identity (since the participants are invited to construct their organization), and the various source domains can emerge from a vast array of possibilities from which participants to the intervention select.

### *Data Analysis*

The data of our interpretive case illustration consist of video recordings and post-workshop interviews collected during and shortly after a 2-day management workshop of the business operations team of CellCo (a pseudonym), a European mobile telephony provider. Within a broader collaboration, CellCo had mandated IdentityFactory (a pseudonym two coauthors were associates at the time) to conduct a workshop that



was facilitated by two other associates. The workshop aimed at exploring and addressing the strategic and operational implications of the major changes in CellCo's business landscape following a recent merger. The two IdentityFactory colleagues of two of the coauthors debriefed the workshop with the coauthors shortly afterward, as well as providing additional contextual information on CellCo. One of the coauthors conducted follow-up interviews with workshop participants. The coauthors were familiar with the principles of the serious play method given their facilitation of other workshops of this nature, enabling them to effectively interpret the session videotapes.

While IdentityFactory had conducted several, similar workshops in CellCo, we chose this data set since we were able to draw on a complete video footage of the workshop—which allowed for a detailed analysis of the Type IV metaphor approach (Heath & Hindmarsh, 2002). In analyzing the approximately 6 hours of video data, we paid close attention to the complex, multimodal metaphors developed by the participants. We noted that these metaphors were constituted by least three interrelated, dominant modes: spatial, linguistic, and bodily. The spatial mode was relevant as these metaphors were based on three-dimensional constructions. Thus, the positioning, elevation, and connections or lack thereof of elements in these metaphors came to be meaningful within locally developed identity narratives developed by participants. The other mode was linguistic, which we observed through the vocabulary participants used to describe and decode their constructions, and to outline the narratives embodied in them. A third modality we observed was the bodily one—the way participants were positioned with respect to each other and the complex metaphors they were creating, what their body language signified, and what gestures they used when they outlined what they had built. In the subsequent section of this article we will provide additional background on CellCo and elaborate further on the spatial and narrative modes of the complex metaphors constructed by participants.

### **Case Illustration: CellCo**

In 2000, CellCo was the fastest growing of the three largest players in its domestic market, with a market share of nearly 25%, and an image of a dynamic, innovative, and unconventional company. Then two strategic changes affected the company and its business landscape. First, CellCo purchased a domestic 3G license through competitive bidding, and financed this purchase through taking on a huge debt. Second, shortly after making this purchase, CellCo was acquired by FixCo, a large, European competitor that was the market leader in its own domestic market. FixCo subsequently decided to create a new organizational entity called "CellCo Global," and place CellCo—as well as FixCo's entire international mobile telephony operations—into this new entity in order to benefit from CellCo's superior brand recognition.

Despite assurances by FixCo that CellCo Global would retain a high degree of autonomy, CellCo Global's management team was highly concerned that the acquisition would have an impact on the company's strategic direction and operational priorities. During this 2-day retreat, eight managers of business operations divisions—the division head and his direct reports, four male and three female—explored and built a

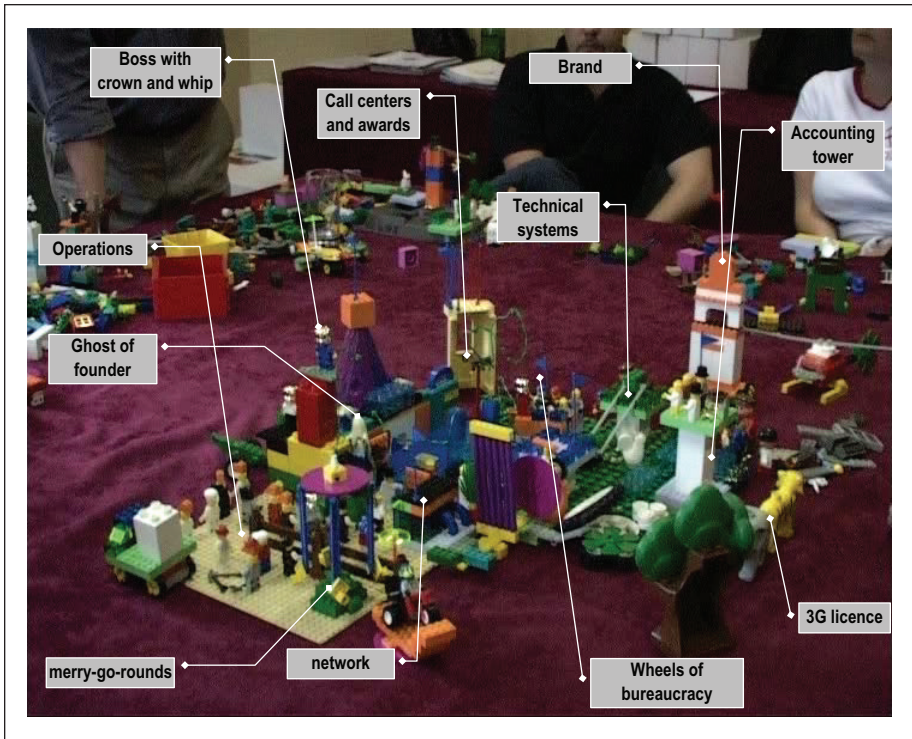
shared view of the adjusted, postmerger business landscape of their respective domains.

Below we demonstrate how eliciting complex, multimodal metaphors can help to surface organizational identity beliefs of participants when jointly constructing a compound metaphor of the organization and its environment, which in turn can be employed by OD practitioners for diagnostic purposes. We present first how participants collectively constructed a compound metaphor of the organization to represent their organizational identity beliefs. In doing so, we stay as closely as possible to the first-order framings of participants. In a subsequent step, we then show how OD practitioners can draw on this compound narrative to analyze and diagnose important aspects of organizational identity beliefs with respect to centrality, endurance, and distinctiveness of CellCo.

### *Surfacing Organizational Identity Beliefs at CellCo*

Before reporting the findings of our analysis, we will briefly outline the analytical protocol with which we made inferences from our data into our diagnostics (for a more detailed explication of this analytical process, see Heracleous & Jacobs, 2008). When analyzing Type IV metaphorical mapping processes, the *first analytical step* consists of conceiving of the physical models and their attributed meaning as metaphors. Metaphors map a (typically better known) domain onto a (typically less known) domain. But rather than simply mapping, this process represents a creative exploration between the two domains that typically creates new meanings (e.g., Cornelissen, 2005). Thus, the *second step* consists of carefully tracking these three elements in the metaphorical mapping process. What are source and target domains? Which emergent meaning is generated from this creative mapping process? This generic analytical protocol is then applied in the following sequence. First, we tracked initial mappings in terms of the individually built models that later went on to form part of the broader model. For instance, a lighthouse (source domain) was used by a participant to represent CellCo's brand (target domain). Second, we then explored relational mappings, that is, how these initial mappings were related to other individually built mappings in the model. For instance, we explored the physical positioning of the lighthouse vis-à-vis more central elements of CellCo's castle. It was suggested by a participant that a remotely positioned lighthouse (source domain) represented the decreasing relevance of the brand at CellCo (target domain). Third, and in a last step, we tracked how the relational mappings were then integrated into a large compound metaphor. For instance, how the totality of the relational mappings (e.g., castle, lighthouse, elephant, and tiger) build up to comprise a broad metaphorical mapping, namely, that of a previously proud and strong castle (source domain) that has now become conquered and, thus, rendered uncertain and fragile (target domain).

The group's final compound metaphor portrayed CellCo as a castle, the most recent conquest of the "FixCo Empire." A previously strong, defendable fortress had become vulnerable and had now been conquered—with its members now taking orders from



**Figure 2.** Exploring organizational identity at CellCo—“The conquered castle.”

the conqueror, the new owner of the castle (Figure 2 illustrates the compound metaphor).

To further elaborate, the “target domain” of the mapping consisted of CellCo as an organization. In order to make sense of CellCo’s current status, participants’ discussion led them to draw on the source domain of a “conquered castle.” This mapping resulted in emergent new meaning, and its “fit” was appreciated by participants as it represented the issue of bygone strength and autonomy in the acquisition process. Table 1 summarizes five core components of the compound metaphor and shows the source, target, and emergent meaning aspects of the metaphorical mapping.

On entering the CellCo “castle” through a castle gate entrance with CellCo’s brand icon on top symbolizing the organization’s image to the world, business functions such as call centers or customer service were portrayed as disconnected platforms to represent their lack of organizational alignment or coordination. A call center was portrayed as six call center agents working at their PCs, where a person-figure wearing a crown and a whip symbolizing strict, authoritarian management represented the call center manager. The central castle square hosted the “heart” of CellCo’s service, the mobile network.

**Table 1.** Exploring CellCo's Organizational Identity Through Complex Multimodal Metaphors.

Multimodal Metaphorical mappings (authored by participants)		
Multimodal source domain	Organizational target domain	Emergent meanings (perceived by participants)
Recently conquered "castle"	CellCo organization as a whole	Castle as a previously strong and defensible entity  Being conquered symbolizes loss of autonomy and strength
Lighthouse—in the periphery	Relevance of the CellCo brand	Lighthouses provide guidance Now that it is in the periphery, the brand has lost its guiding strength
Elephant and tiger facing different directions	Ambiguity of 3G license	Elephant and tiger as two strong animals differing in weight, agility, and aggressiveness  While the tiger of growth connotes success, an elephant around the neck implies failure
Ghost figure	Bygone spirit of the founder	A ghost refers to the spiritual but not physical presence of a dead person  And yet the ghost here refers not only to the fact that the founder has left the organization but, more important, also that his entrepreneurial spirit is gone
Empty merry-go-round	Bygone fun and motivation	A merry-go-round is an artifact of frivolous play Having this artifact present, yet empty is to point to the fun that used to be core to the organization but now is no more

A white tower hosted several person-figures with black hats, all in the same posture and facing in the same direction, to represent the accounting department—and the renewed emphasis on the reaffirmed dominant business logic of shareholder value, after the acquisition. The accounting function was portrayed as a remote, yet powerful, politically ambiguous, uniform, and faceless activity in CellCo.

The brand that had driven CellCo in the past was symbolized by a tall, mobile lighthouse on wheels, deliberately positioned outside the castle walls. Although the brand was still relevant and influential, it was somewhat remote and disconnected. Also, outside the castle was a set of scattered gray bricks representing a "gray

invasion” of bureaucracy and business logic in CellCo. On the castle square was a set of disconnected wheels also representing dysfunctional bureaucracy. Close to them yet outside the castle were two animal figures: an elephant and a tiger, facing opposite directions, and representing the perceived ambiguity and risk with respect to the 3G license purchase that could either turn out as “an elephant around our neck” or as a “tiger of growth.”

Next to the castle’s main compound was an annex building located on a smaller platform. It hosted a set of upward facing purple tubes representing “projects in the pipeline” that were as yet unused since they were not physically connected to any of the functional domains. An unpopulated carousel with yellow seats (merry-go-round) represented the potential and (past) fun of working in the organization. Next to the carousel and by far the largest population in this annex building was a “herd” of person-figures symbolizing members of operations staff. They were all positioned within a fenced area, facing different directions, thus indicating a lack of direction and coherence. Although some of them wore brand icon hats, others were “brandless,” thus considered outsiders who were nevertheless inside.

On top of a pyramid-type construction representing formal hierarchy, was a person-figure wearing a crown and a whip with his back to the team, representing the head of business operations. This authoritarian figure did not wear any brand icons at all, also symbolizing a certain foreignness relative to “branded” members of the organization. On the bottom of this winners’ podium, and on the same platform as operations staff was a ghost figure, “the ghost of the founder,” symbolizing the founder’s image at an earlier time of being “one of the lads.”

### *Diagnosing Organizational Identity Beliefs at CellCo*

The above compound metaphor “authored” by participants lends itself to a detailed OD diagnosis regarding organizational identity beliefs that a skilled OD practitioner would take up with participants later on. For instance, the portrayal of CellCo as having lost its former strength and autonomy—Do participants believe that CellCo lost a *central* feature? Similarly, portraying the lighthouse as a peripheral feature of the compound metaphor—Has CellCo lost a *distinctive* feature? Also, representing the founder as a ghost and the bygone fun as empty merry-go-round—Have these features not *endured* as participants had hoped they would? Such questions can be further probed in dialogue with participants to gain further insights on why participants may be feeling as they do, and what might be appropriate directions for the future.

A second-order diagnosis of these initial insights then involves a rough grouping in terms of organizational identity beliefs regarding centrality (strength, autonomy, role of brand), distinctiveness (brand, role of 3G license), and endurance (entrepreneurial spirit, fun). Table 2 illustrates the diagnostic steps of the process.

These insights might inspire an OD practitioner to run more detailed diagnostics, as well as to explore how these insights could translate into suitable OD interventions. Yet the above insights in themselves could be highly consequential for this postmerger situation. Indeed, the ambiguous role of the brand as manifested in this and other

**Table 2.** Organizational Identity Diagnosis Based on Participants' Complex, Multimodal Metaphors.

First-order organizational identity diagnosis (Authored by organizational development [OD] practitioners)	Second-order organizational identity diagnosis and associated OD considerations (authored by OD practitioners)
Has the organization lost its former strength and autonomy—considered <b>central</b> to its existence?	<b>Centrality</b> The acquisition process has adversely affected features of CellCo considered central to its identity. These include its sense of autonomy and strength, as well as its brand. How can the organization regain its sense of self? Can the centrality of the brand be restored, perhaps with the brand having different connotations than the past?
Has the brand, previously considered <b>unique</b> , lost its function of guiding and creating organizational coherence?	<b>Distinctiveness</b> 3G license seen as ambiguous and it is unlikely that it can give CellCo distinctiveness in the marketplace since most large telecom firms have such a license. If so, where will uniqueness come from?
Does the 3G license have potential to be a feature of <b>uniqueness</b> that will accelerate growth (tiger of growth), or will it become an elephant around our neck?	<b>Endurance</b> Over time, previously central aspects such as the spirit of the founder, conveying belongingness and the fun aspect of the organization have been lost. How can a sense of belongingness be restored? How can working at CellCo again become fun?
The previously <b>central</b> entrepreneurial spirit of the founder has not been <b>enduring</b> (even though the memory endures)	
The previously <b>central</b> fun element of the organization has not been <b>enduring</b> (even though the memory endures)	

workshops of this kind at CellCo ultimately led the human resources department to cancel a major leadership development program that had been designed entirely around a view of the brand that most of its members deemed outdated.

## Discussion

In this article, we set out to extend the OD diagnostics repertoire by advancing an approach for surfacing organizational identity beliefs through the elicitation of complex, multimodal metaphors. Fundamental organizational change is often perceived by organizational members as a threat to what they deem central, distinctive, and enduring about their organization. Therefore, ignoring or neglecting organizational identity beliefs in processes of change poses a significant risk to the success of such change.

We thus argue that OD practice might benefit from an effective and practical diagnostic instrument in this regard. Eliciting complex, multimodal (Type IV) metaphors holds promise as a means of surfacing and diagnosing organizational identity beliefs—as demonstrated in our case illustration of the postmerger situation of CellCo Business Operations' team.

As outlined in detail above and in Figure 1, Type IV metaphor interventions consist of local, participant-authored metaphors in several modalities such as change drawings and analogically mediated inquiry. While acknowledging the overall relevance of Types I to III approaches, in our own OD experience we note that a Type IV intervention provides swift, image-rich, and detailed insights into the organizational identity belief of a group or team. While we remain careful in claiming any superiority, we believe that such swiftness and detail result from the enhanced expressive repertoire afforded to participants as they develop locally grounded metaphors through a structured collective process. In this respect, our article stands to make several contributions that we discuss in turn below.

### *Implications for OD Diagnostics*

As organizational change and transformation is at the core of OD practice, we believe our Type IV metaphor approach for diagnosing organizational identity beliefs extends the current diagnostic repertoire of OD with an effective, practical approach to surfacing such beliefs. The technique described in this article has been identified as a useful means of tapping into unconscious or “tacit” organizational identity understandings that may usefully be employed to enact organizational change (Oliver & Roos, 2007). Furthermore, as Burke (2011) reminds us, “determining the right behaviors is only half of the change effort” and thus “if we are serious about changing an organization fundamentally, we must sooner or later tackle its culture—the norms, deeply held beliefs, and eventually the collective unconscious” (pp. 150-152). To have any chance of accomplishing this, the diagnostic phase of an OD process is crucial, since

during the initial stages of an organization change effort, we do not know what these unspoken, beneath-the-surface concerns and factors are. Much if not most qualities and dimension of the culture are difficult to identify and to define and therefore difficult to anticipate.

Although we acknowledge the important difference between organizational culture and identity, we nevertheless see them as reflexively implicated (Hatch & Schultz, 2002). We believe that organizational identity expresses cultural understandings and in turn, that “reflecting on organizational identity embeds that identity in organizational culture by triggering or tapping into the deeply held assumptions and values of its members which then become closely associated with the identity” (Hatch & Schultz, 2002, p. 1000) Although conducting a fully fledged organizational culture analysis might be highly desirable, it is rarely feasible in a cost- and time-effective way. Thus, if we consider organizational identity beliefs as reflexively implicated with

organizational culture, their diagnosis will provide a proxy to, if not window into, important aspects of an organization's culture. In fact, several elements of the embodied metaphors built by participants can give clues as to aspects of the culture, such as disconnected departments, leaders holding whips, or a type of infrastructure symbolizing the heart of the construction. In this respect, our approach answers Burke's (2011) call for more *innovative, nondirect* approaches to reveal central aspects of an organization's underlying assumptions, norms, and beliefs of its members.

So what principles should guide an effective Type IV metaphor intervention? Although the design of a Type IV intervention has been described in more detail elsewhere (Heracleous & Jacobs, 2011; Statler & Oliver, 2008), the crucial aspect in effectively diagnosing organizational identity beliefs with this approach lies in the skillful debrief and interpretation of the models—a key task of an OD facilitator. Most broadly and from a Weickian angle, a Type IV metaphorical mapping process involves “reading a metaphor while writing it.” Thus, debrief and interpretation need to carefully disentangle that which is somewhat amalgamated in the process, namely the construction of a physical model (that can be amended and modified), the model's intended meaning (which can change within the process of debrief and interpretation), and the collective process of construction (which is often indicative of the intended meaning). Thus, an OD practitioner who is to facilitate such a session might benefit from the following principles relating to debriefing and interpreting the models so as to achieve a nuanced diagnosis of what participants believe the organization stands for. The overarching skill required for an effective Type IV facilitation is the ability to attend to microlevel details of the model while simultaneously keeping the macropicture in mind. In other words, it is the skillful oscillation between attending to detail, while bearing in mind its relation and relevance for the model at large and its meaning. In light of this, a few guiding principles apply. First, one needs to pay heed to three distinct, yet interrelated levels of interpretation, namely physical model (what do we see?), its attributed meaning (what is it supposed to mean?), and the process of construction (how was the model built?). Second, one needs to pay close attention to the way the metaphorical mapping process is unfolding. Specifically, it is important to track which source domain (e.g., a crocodile figure) is mobilized to represent which target domain (e.g., a competitor). Third, these initially superficial mappings should be probed more deeply, by “testing” how well the implied analogies between the target and source domains hold. For example, *how* do the characteristics of a crocodile resonate with the characteristics of the competitor in question? Fourth, it is important to carefully “test” each element of the construction in the context of an overall bird's eye view of the aggregate and often complex construction. A facilitator can do this by inviting participants to “test-drive” and validate the collective construction, for instance, by inviting one member to debrief the model in order to check for any remaining areas of ambiguity and dissent. Based on a positive validation of the collective model, the facilitator should have a well-grounded understanding of this group's collective organizational identity beliefs.



### *Implications for OD in General*

We sympathize with recent calls to more deeply explore the potential of a social constructionist, discursively grounded perspective on OD theory and practice that has been referred to as “new OD” (Bushe & Marshak, 2009; Marshak & Grant, 2008; Grant & Marshak, 2011). Our Type IV metaphor approach seeks to extend the repertoire of available options for pursuing this new OD. Overall, we share these proponents’ critique of classical OD in terms of its modern-positivistic premises. We also share their ontological and epistemological commitment to social constructionism in terms of truths being multiple and situative, organizational reality and concepts such as “strategy,” “culture,” or “identity” as socially negotiated, and change being rather continuous rather than episodic (Bushe & Marshak, 2009, pp. 350-351; Marshak & Grant, 2008, p. S8). In particular, we support their suggestion that “newer OD practices” should actively embrace and practically enact the foundational commitments of a social constructionist, discursive perspective in terms of interventions that aim at exploring and developing common ground, changing mind-sets and consciousness as well as accounting for diversity at many levels (Marshak & Grant, 2008, pp. S9-S10).

Thus, we advance the notion of diagnosis through dialogue (e.g., Gergen, Gergen, & Barrett, 2004; Jacobs & Heracleous, 2006), that is, the creation of situative, local knowledge (such as complex Type IV metaphors) developed and evaluated for its relevance through dialogic interactions (such as those occurring in the workshops where these metaphors are constructed) by those affected by change. In this context, we believe that such nonobjectivist diagnosis will not only remain a crucial component of (new) OD process and practice but will be extended through novel approaches to diagnosis such as the one we advance here.

Furthermore, our approach is also scalable to the level of bringing the whole system in the room, for example, 50 to 80 people as used in the Future Search process (Weisbord & Janoff, 2005). We have used this approach with more than 60 participants divided in subgroups of around 8 to 10 individuals each. Our approach is consistent with the attributes of Future Search, as it enables exploration of the whole through group construction of representations of that whole, and seeking common understandings of key aspects of whatever organizational challenge is being addressed. It, however, is different from Future Search in that the groups involved are not self-managed but rather facilitated using the specific technology of this approach, and also subsequent actions often depend on authorization and motivation by senior levels of the organization rather than being self-initiated.

### *Implications for Organizational Identity Scholarship*

We also aim at informing organizational identity scholarship beyond the dominant textual “mode” of inquiry, to include explorations of the meaning of symbolic and embodied sources of data as shown in Tables 1 and 2. Apart from some fundamental ontological and epistemological debates, the field of organizational identity has always struggled with the methodological challenge of how to study identity. We believe that

surfacing organizational identity beliefs by means of exploring multimodal compound metaphors can provide a fruitful avenue in this regard since organizational members are actively involved in constructing and debating compound metaphors, for which an organization's identity is the target domain. In this way, this approach responds to Brown's (2009) call for more pluralistic and multifaceted identity-centered conversations. The representations that result from this process draw on more than just textual and narrative descriptions common with other methods, incorporating tangible, visual-material, and kinesthetic elements. The potential of this method to enable richer identity descriptions is high, since it invites participants to actively engage in "hands-on" organizational identity work that results in a compound metaphor representing organizational identity beliefs of that group. Such an approach might be one way to facilitate, as well as capitalize on, the "inevitable personal-social relation" in identity research (Alvesson et al., 2008, p. 10).

In our case example, the compound metaphor was produced through integrating a multiplicity of individual organizational identity beliefs that were used in negotiating the shape and meaning of the collective model. In this way, Type IV compound metaphors may be thought of as multidimensional, multimodal, negotiated, emergent representations of organizational identity beliefs that have both a tangible, embodied existence in terms of the physical construction as well as a conceptual existence in terms of the metaphorical narratives represented in this construction. In this way, they can reveal moments of insight concerning important *shared* organizational identity beliefs at a given point in time. Given organizational identity's evolving and contextualized nature (Alvesson et al., 2008), such an approach may prove more useful than interviews or survey completion techniques, in which data collection tends to be asynchronously collected over an extended period of time. Finally, by deliberately engaging with participants in the generation of categories through attention to first-order interpretations as they appear in both discursive and embodied data, the embodied metaphorical mapping method displays a strong emic component. Although generalization based on specific elements of single constructions would be unwarranted, we believe that through the embodied metaphorical mapping approach it would be possible to analyze cross-case patterns such as spatial or narrative features of the constructions to develop broader etic implications about how the presence of these features can inform our understanding of agents' first-order perceptions about their organizations. In this respect, such an approach would extend in an organizational identity-relevant direction the initial work by Heracleous and Jacobs (2008), who through cross-case analysis identified specific spatial features (such as elevation or centrality) as corresponding to specific rhetorical functions in organizational narratives (such as power and importance) of the elements represented.

### *Limitations and Directions for Future Research*

Clearly, our analysis of one shared organizational identity mapping may appear very consensual and homogenous—given the earlier acknowledged more critical stances on organizational identity. Yet plurality and dissent are not absent from Type IV

processes. Rather, the focus of this particular inquiry has been the outcome of a Type IV intervention in terms of a collectively constructed Type IV metaphor to represent this group's—however temporary—organizational identity beliefs. In our experience, necessary controversies about different organizational identity beliefs occur first when participants debrief and critically juxtapose their individual models, and second, when they are invited to work toward a joint model. The latter step typically involves an intense process of meaning negotiation at the artifactual as well as conceptual level. Thus, a further inquiry drawing on such a data set might probe into the process details of how such agreement or consensus have been achieved.

Future research might also attend to the background of the empirical component of this study—a postmerger situation—which provided a particularly rich context within which to explore issues of organizational identity. Along with other interorganizational arrangements such as acquisitions, joint ventures, and outsourcing arrangements, the context of a merger appears to hold considerable research potential for scholars interested in organizational change and identity, due to the organizational upheaval and perceived threat to identity involved. The usual sense of continuity is disrupted, and the organization's identity may gain a heightened salience in the minds of organizational members as they attempt to make sense of their new organizational reality. Thus, our approach might be mobilized by a strand of inquiry that investigates these phenomena, such as Corley and Gioia (2004) or Vaara et al. (2003).

Future research drawing on elements of our method as described here could be conducted to explore issues of identity change over time, an area in which relatively little empirical study has occurred to date (Brown, 2009). By returning to the same organization one or more times in future, more of a longitudinal understanding of the robustness (or enduringness) of first-order identity descriptions could be gained. Would participants rebuild similar constructions with similar meanings, or similar constructions but attributing modified meanings to them, different constructions but embodying similar meanings, or different constructions with different meanings entirely? An alternative direction would be to conduct cross-case analysis, so that potentially generalizable patterns could be identified, for example, specific spatial or narrative features that correspond to specific aspects of organizational identity, or aspects of any other domain studied through this approach. These would qualify as *moderatum* generalizations, or middle-ground, “modest, pragmatic generalizations” (Payne & Williams, 2005, p. 296) that would be testable through researching additional cases, and amenable to adjustment or refutation.

A broader direction for future research would be to extend our Type IV metaphorical approach to other domains in organization theory, for example, strategic change, organizational design, or organizational socialization. In this light, the workshop technology could be adjusted accordingly, to correspond to the domain studied. In the case of organization change, for example, participants could be asked to construct, individually and then collectively, their view of the change process and their role within it. Analysis would then reveal, in a rich and colorful way, what they really think about the process, how it relates to them, and even whether they intend to participate in it or sabotage it. Such research would not only extend our understanding of these contexts but would further accord with the ideal of revealing actionable knowledge (Argyris, 1996).

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