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**The qualitative survey as mechanism for exploring organisation identity**

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**The qualitative survey as mechanism for exploring organisation identity**

The contribution of this study lies in the development of a qualitative survey for obtaining member-based descriptions of organisation identity. It was found that the qualitative survey provides a means of accessing narratives fragments which, using a bricoleur-like process, enabled the development of organisational identity narratives and statements which encompassed a wide range of member perspectives as well as dissonant voices.

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## 1. Introduction

The concept "identity" is often dismissed as "vague, hard to pin down, elusive" and is likened to an onion, because "it is multi-layered (and perhaps has only a virtual center that, with quantum irony, vanishes when it is reached)" (Whetten, quoted in Albert 1998, p.11). From a management perspective, organisational identity has important implications for understanding various aspects of organisational functioning for example, change (Chreim 2005; Backer 2008), relationships between organisations and their stakeholders (Brickson 2005), strategic decision-making (Dutton and Dukerich 1991; Riantoputra 2010); identity reconstruction (Kjærgaard *et al.* 2011) and competitive differentiation (Van Tonder 2011). From an employee perspective, organisational identity acts as a psychological anchor, playing a significant role in influencing how issues are interpreted, the importance assigned to them as well as actions taken to deal with matters (Dutton and Dukerich 1991). As such, identity is key to explaining why people respond to their environments the way they do, why they choose to stay or leave an organisation, why they approach their work and interact with others the way they do (Ashforth *et al.* 2008). By providing members with a set of guidelines in negotiating their environment, organisational identity helps keep focus on what is important and thus reduces uncertainty (Gustafson and Reger 1995). Because of the pivotal role of OI, it can be argued that a mechanism for surfacing identity claims, as viewed by all organisational members, can have distinct advantages for management.

Many of the designs currently employed to explore organisational identity are time-consuming, and difficult to carry out in large multi-national companies that are geographically dispersed. For example, case studies and ethnographies typically rely on smaller samples as data is gathered by a single or small group of researchers, making it difficult to access a truly multi-vocal account of organisational identity. Furthermore, traditional surveys are ill-suited to the exploration of identity (Brown 2006), as they are unable to capture the "distinctiveness" central to the concept (Albert and Whetten 1985). One possibility is the use of a qualitative survey, which has as its aim the description of a phenomenon, particularly suited to explore the diversity therein (Jansen 2010).

Given that organisational identity is assumed to be constituted by multiple voices through discourse and narrative (Backer, 2008; Brown 2006; Sheep *et al.* 2015) we propose that a qualitative survey allows for the open-ended exploration of organisational identity, as it is

viewed by multiple organisational members, ensuring a plurivocity of voices and avoiding the domination of the identity narrative(s) by one group or sub-group. A qualitative survey, coupled with the internet as data-gathering medium, makes possible the study of identity in large organisations whose members are geographically dispersed, as it provides access to the discursive fragments of which OI narrative(s) are composed. The aim of the study was to explore an internet based qualitative survey as a means for describing a multi-vocal account of organisational identity.

In this paper, we contribute to our understanding of the study of organisational identity by firstly, describing the development of an internet-based qualitative survey for obtaining contextually based descriptions of organisation identity and secondly, invoking the concept of the bricoleur (Levi-Strauss 1962) to describe how this was used to develop member-based organisational identity narratives.

## 2.    Conceptualising organisational identity

The concept, organisation identity, originated in the work of Albert and Whetten (1985) who first defined the concept as that which is central, distinctive and relatively enduring about an organisation. This definition conceptualised organisational identity as an "entity" in which core, distinctive and enduring features (or characteristics) of an organisation were *described.* More recently, however, studies have sought to conceptualise organisation identity as a process, *explaining* how the core, distinctive and enduring characteristics come to be (Clark *et al*. 2010; Kreiner *et al*. 2015). Gioia and Patvardhan (2012) liken the process approach to OI as "the full motion picture" whereas the characteristics approach represents a single frame of the full picture (p. 53). Without denying the value of exploring the means by which organisations "become identified" it is the "being identified" of two heritage firms that forms the basis of this research.

For the purpose of this study OI was considered to be a "collection of individual-level understandings" (He and Brown 2013, p. 6) of the heritage firms which reflect collectively held and socially constructed realities regarding each of the organisations surveyed (Corley, *et. al.* 2006; He and Brown 2013 p. 8). These shared (in varying degrees) constructions arise from interactions amongst multiple members from across various divisions and hierarchical levels

(Glynn, 2000; Kjaergaard *et al.* 2011) but are nevertheless influenced by more "formal" identity claims made by the organisation as social actor (Ravasi and Schultz 2006).

Whilst the aim of the survey was to develop a snapshot of organisation identity the means through which this was achieved relied on the input of employees in their expression of identification or dis-identification with various aspects comprising the organisation, constituting a form of organisational identity work (Kreiner *et al*. 2015).  For the purpose of the study, organisation identity was viewed from a discursive perspective (Brown, 2017) which implies that "identities and identification are constituted through situated practices of language use" (p. 301).

To date, organisational identity has been studied using variations of the Twenty Statements Test. The original instrument, by Kuhn and McPortland (1954), was developed to capture individual identity and comprised incomplete sentences that required participants to respond to the question "Who am I?". This was adapted for the exploration of organisational identity by reformulating the question as "Who am I? as "Who are we (as company X)? (Brickson 2005; van Tonder 2006). In addition to the Twenty Statements test, organisation identity has also been studied by reference to dimensions of organisational functioning. Bronn *et al.* (2006) and Alvesson and Empson (2008) are authors who have tackled the question of what constitutes the "substance" of organisation identity, those characteristics on which notions of centrality and distinctiveness are based. Included in their studies are elements such as types of staff and clients, services and reputation, management systems and styles, values and culture, and dominant logic. The aim in these studies was not to find out about successful staff, the culture, management or leadership per se but rather how these together exemplify something of the organisation as a whole, namely its identity. The advantages of not asking about identity directly were that it would not impose an understanding of identity that might not be there, and would minimise the effect of social reporting (Alvesson and Empson 2008).

## 3. Research methodology

### 3.1 Research setting

The survey was conducted in two engineering firms (Alpha and Beta) that had recently merged, and one of the motivating factors was to determine how similar or dissimilar the newly merged identities actually were. In planning the merger, consideration had been given to the similarity

of the two firms with regard to a variety of factors, including culture but no consideration had been given to OI. When the first author approached the company with regard to another OI project, the CEO and HR director requested an OI survey and the project developed from there. Having a firm understanding of the OI literature enabled us to develop a theoretically sound but useful instrument for exploring each heritage[1] organisation's identity.

At the time of data collection, the merger was about three months old, providing ideal circumstances under which to study organisational identity as this is best articulated when under threat (such as a merger or an acquisition) or when faced with major disruptions such as bad publicity or crises (Albert and Whetten 1985; Dutton *et al.* 1994; Elsbach and Kramer 1996). Coming so soon after the merger meant that memories were still fresh and nostalgia was likely to be present (Brown and Humphreys 2002). Access was gained through a close personal acquaintance but rested on the academic nature of the proposed study.

### 3.2 Developing a qualitative organisational identity survey

Jansen (2010) argues that the qualitative survey constitutes a legitimate type of research design and while it is often used (see for example Carter 2002; Kane 2008), it is seldom considered a "true" research design. Whilst the aim of both qualitative and quantitative surveys is primarily descriptive, the qualitative survey is used to describe a phenomenon in context following *a logic of contextualisation,* as opposed to a quantitative survey, which aims to generalise beyond context, and employs a *logic of generalisation* (Mouton 2012). Researchers using qualitative surveys are usually not aiming for representative or generalisable results nor are they interested in the "typical" person; rather the aim is to provide meaning and uniqueness to questions of interest (Fink 2003). The emphasis on describing diversity (Jansen 2010) is what makes the qualitative survey particularly useful in exploring OI.

Informed by the work Bronn *et al*. (2006) and Alvesson and Empson (2008) as well as the extant literature on OI, open-ended survey questions were developed to address various characteristics of organisations around which centrality and distinctiveness could be based. These included elements such as types of staff and clients, services and reputation, management systems and styles, values and culture, dominant logic and company motto. A list of these questions as well as the source that inspired them are listed in Table 1. The assumption

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[1] The term "heritage" was used to refer to the two firms which comprised the merger, Alpha and Beta.

was that in presenting their organisation along various dimensions, employees would contextualise these elements, locating them in particular discourses perceived to be relevant to the organisation's identity (Karreman and Alvesson 2001, p.63). The open-ended nature of the survey invited organisational members to engage in organisational identity work as they drew on organisation, professional, national and political discourses as a resource in constructing identity (Kreiner *et al.* 2015; Sheep *et al.* 2015).

To overcome the challenges of distribution, use was made of an internet based survey (Fleming and Bowden 2009). There are several benefits associated with internet-based surveys, and these include greater anonymity (Simsek and Veiga 2001); the reduction of power differentials (Shields 2003); longer and more substantive responses to qualitative questions (Kierman, *et al.* 2005); ease of development and administration (Fleming and Bowden 2009); reducing the risk of transcription errors (as in paper and pencil questionnaires) (Vehovar and Lozar Manfreda 2008); the ease with which reminders can be sent, multiple times if necessary (Sue and Ritter 2007); the economic benefits and more people can be reached over a geographically dispersed area (Fleming and Bowden 2009). These benefits mean it is particularly suited for organisational identity research, allowing the researcher to identify (potential) "symbolic rallying points" (Brown 2006, p.742) employees associate with their organisation's identity, drawing on the "local world of stories" within which they operate, to describe their organisation (McAdams 1996, p.298). While the data generated in the survey would not generate the same detailed descriptions as one would expect from an in-depth interview or focus group, the aim was to explore whether they would be sufficiently detailed and rich in content to allow us to discern "discursive regimes" through which employees accomplish organisational identity (Clark *et al.* 2009).

### 3.2 Sampling

Although the qualitative survey is usually associated with purposive sampling (Jansen 2010), given our aim to gather a (potentially) diverse range of views regarding organisational identity a mixture of stratified and random sampling was used (Babbie and Mouton 2001; Fricker 2008). Stratified sampling ensured representation from varying job groupings, but within these groupings, members were selected on the basis of probability sampling. Of the total of 340 questionnaires sent out, 242 responded, a response rate of approximately 71%. However, once we had worked through all the responses we removed 97 respondents as there were too many

questions left unanswered, and were thus left to work with 140 completed questionnaires, a response rate of approximately 41%.

## 3.3 Data collection

The survey was managed internally by the HR Director and externally by a survey specialist who provided both survey-related and technical guidance and support (Sue and Ritter 2007; Vehovar and Lozar Manfreda 2008). The HR director sent out the questionnaire on behalf of management, and specifically the CEOs of the heritage firms. The email contained a request to participate in the survey, providing a link to the survey itself. The email made clear that the study was being conducted on behalf of the organisation by independent consultants, and it was to these persons that any queries were directed. We included a request for demographic information. Important organisation-related demographic information was incorporated at the start and included questions regarding staff category, years of service, organisational unit and job title. At the end of the survey we asked for more personal demographic information which was less crucial to the interpretation of the results.

In addition to the survey, we used company documentation to shed light on the organisational context and to help contextualise the discursive fragments, thus ensuring a more probable interpretation of meaning (Boje 2008). Documents included company profiles per country, staff newsletters, marketing brochures, project reviews, a biography of the founder of one of the companies, chairperson's reports and group magazines.

## 3.4 Data analysis

Open-ended questions generate interesting and challenging texts to analyse as they contain various types of data including shorter "free list" types of text as well as narrative explanations in sentences and paragraphs (Jackson and Trochim 2002). In this study this was certainly the case, and a variety of textual data was present, including one-word answers, short phrases and brief paragraphs, the longest being 234 words. The challenge lies in dealing with textual data with none of the richness or depth usually associated with ethnographic or case-study research. In this process, we were guided by the concept of the bricoleur (Levi Strauss 1962) as described by Crotty (1998). In some circles, the bricoleur has been interpreted to mean something akin to a "Jack-of-all-trades" (Denzin and Lincoln 1994, p.2), the implication being that as researchers we should be comfortable working from multiple perspectives and possess multiple skills, approaching the topic of study with imagination and inventiveness. However, Crotty

(1998) argues that this meaning is very different from the meaning of bricoleur, as used by Levi-Strauss (1962). In the context of "The Savage Mind", the text in which the term is used, the bricoleur is far more than a multi-skilled handy-man, but rather "a makeshift artisan, armed with a collection of bits and pieces that were once standard parts of a certain whole but which the bricoleur, as bricoleur, now reconceives as parts of a new whole" (Crotty 1998, p.50). The question that faces the bricoleur is: "what can I make with what I have?" and the focus is on the possibilities presented by the material the person is working with. With this conception in mind, the data was analysed using the following steps.

### 3.4.1 Developing open codes

We began the analysis by assigning data-driven, open-ended codes to data extracts. In cases where only one word was given, we assumed these words to have a similar meaning as they belonged in the same "language game" (Wittgenstein 1958). In other instances, we were able to make sense of responses based on other data extracts as well as company documentation. Some made little sense even in the context of the other data, and had to be discarded entirely. For examples of the open codes and associated data extracts, please see Table 2.

### 3.4.2 Developing meta-themes

The development of second-order codes proved challenging when faced with narrative fragments and no research question to guide one in compiling categories. To overcome this, and allow for direction and coherence in the process of second-order coding, we identified three (tentative) broad "meta-themes" or narratives for each organisation, and constructed categories within these, using a form of abductive reasoning. These were initially fairly inituitive based on patterns in the data but were tested and refined as the process of developing second-order categories within the narratives proceeded. For each of the heritage firms three narratives were identified, the first describing the firm's place in the industry, the second relating to their professional status in relating to clients and other stakeholders, and the third describing relationships amongst members of the organisation.

### 3.4.3 Developing second-order categories

Within the broad meta-themes or narratives, the next step was to develop categories to describe the data in a meaningful and manageable way, offering our interpretation of views presented by the participants of their heritage organisation's identity (Basit 2003). Using tables in Word, we began by grouping similar aspects together, based on the open codes but bearing in mind

the context of the identity narrative. Codes were compared and tested against the identity narrative and their assigned second-order category until distinctive identity characteristics were constructed. The second-order categories formed the basis from which the identity statements, as sub-components of the identity narratives, were developed. An example of a second order category with illustrative quotes is given in Table 2.

One of the challenges in analysing the data was to ensure that we was really dealing with identity. In deciding what constituted an important element of identity, we made sure that the idea had not been introduced by one of the questions for example the idea of being professional. In some instances, however, there was a close link between one or more of the survey questions and the identity facet, for example, the importance of clients, which could arguably have been influenced by the questions regarding the organisation's service and client relations. In these instances, we used an additional criterion to ensure that this was truly an identity characteristic and the descriptor had to have been mentioned in response to other questions as well as the ones relating to the particular dimension. For example, the word "client" was one of the most widely used words in the survey, and was used in response to almost all the questions asked, including values, culture, distinctive characteristics and key differences.

In naming the second order categories, we chose phrases that would be suitable responses to the question: "Who are you?", in most instances using phrases from the participants themselves (Strauss and Corbin 1990). Many of the descriptions contained interesting, rich metaphorical descriptions of the firm and we tried where possible to include these in naming the identity narratives and statements as they captured in colloquial terms how participants perceive and talk about their organisation. In instances where no suitable "participant-driven" phrasing could be found, the identity narratives and statements are our own formulations, and represent an attempt to "summarise" the identity-relevant statements that participants have made.

Because identity is open to question and contestation, we paid particular attention to dissonant voices, and included these as part of the identity narratives to provide an alternative perspective to the dominant one, allowing for a more complex rendering of the organisation's identities.

### 3.4.4 Developing the company's identity narratives
The responses to the survey can be likened to a series of "textual snapshots" – each capturing a description of the organisation's identity. The resulting identity narratives constructed are not

unlike the process of montage produced in the world of film which involves a process of "selecting, editing, and piecing together separate sections of film to form a continuous whole" (http://www.oxforddictionaries.com/ us/ definition/ Americanenglish/montage). In the identity narratives, various fragments of text that appear to be related, were combined to produce a more or less coherent description of facets of the organisation's identity. Thus, it is important to acknowledge that these narratives are attributable to both our own reflexive processes and the inputs of the participants, both of which are designed to inform and persuade (McAdams 1996).

## 3.5 Trustworthiness and ethics

Traditionally in qualitative research, the researcher is the means through which data is collected and interpreted. However, in this project, the data was gathered by a more "objective" means and apart from setting the questions, the researchers played no role in data gathering. This making it impossible to account for our personal interactions with participants and the implications of these. Furthermore, because participation in the survey was anonymous, we were also unable to conduct member checks to confirm our interpretations (Creswell and Miller 2000) which proved to be a frustration at times. To account for our place within data analysis and interpretation, a detailed audit trail of the process was developed (Schurink 2009) to ensure a conceptual link between the narratives produced and the data upon which they are grounded (this is available on request). Due to the nature of the process, participants anonymity was ensured (Babbie and Mouton 2001). Participants were allocated a number and any quotes from the data they submitted were referenced by virtue of their participant number, thus ensuring confidentiality.

## 4  Findings and Discussion

Due to the diversity of the participants, the open-ended questions produced a variety of responses, the length of which varied greatly. In responding to the questions, participants tapped into words, phrases, discourses and narratives which, in their view, exemplified their heritage organisation's identity. While some elaborated on the meanings of words or descriptions, others simply invoked a location within a classification scheme (Albert and Whetten 1985). The responses included a wide-ranging assortment of metaphors, statements of ideology, management philosophy and beliefs, culture, values and practices as well as the recollection of meaningful personal experiences and brief anecdotes (Albert and Whetten 1985). We include some examples below:

"rain-makers" (P 54) (metaphors)

"administration kills innovation" (P 29) (management philosophy)

"Do the best work possible using acceptable standards, maintain client relationships. Control costs. Streamline decision making" (P 22) (management beliefs and practices)

"As I am involved with Alpha for two years as employee, I wish to mention that while I was with Makhado Municipality we appointed Alpha on various projects and my experience with Alpha was based on the fact that Alpha was trustworthy, and was always totally committed and had a lot of expertise" (P. 51)[2] (personal experience)

While in and of themselves, the responses to the survey were mere discursive fragments, they gained meaning when placed in the context of other fragments as well as within the organisational documentation (Clandinin and Connelly 2000; Ochs 1997). By allowing participants to describe the organisation in their own terms, the qualitative survey allowed for the participants' perspectives in accounting for identity, making it possible to capture the multiplicity and plurivocity associated with the latter (Brown, 2006).

### 4.1 The qualitative survey and organisational identity narratives

The description of each narrative and its associated identity statements are fairly lengthy and cannot be reproduced in their entirety within the space constraints of this document. However, a summary of the identity narratives and associated statements for both heritage firms is provided in Table 3.

As you will see, each identity narrative comprised several related but distinct identity statements, which captured various facets of the broader identity narrative. In the paragraphs below, we have chosen extracts from both Alpha and Beta's data to demonstrate examples of both an identity narrative and identity statement. With regard to Alpha, we have selected an

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[2] This is a good example of "identity work" as the participant draws on a supposedly "outsider" position, being part of the "Makhado Municipality" to promote an ostensibly "objective" perspective, providing an providing excellent examples of what Albert and Whetten (1985) describe as identity statements being a political-strategic act.

extract of the identity statement "We are a highly regarded engineering company" as part of the broader narrative "We are an industry leader". This is included verbatim below.

### 4.1.1 Alpha: We are an industry leader

### 4.1.1.1 We are a highly regarded engineering company

The company was described by employees as being "well known" (five times), a "well known brand" (P 12) and as having a "good name in the market" (P 13). The word "respected" was used twelve times to describe Alpha's reputation, and once in conjunction with "well-known". It was also mentioned once with respect to stakeholders' views of the organisation: "We were well respected in the industry" (P 21) as well as part of the company motto: "Well known and respected company, providing work of high quality" (P 55) and in response to the cocktail party / plane question: "a company that provides high quality work, has completed numerous prestige projects, both locally and abroad, and is well respected in the building industry" (P 55). Finally one member indicated: "A company with a proud history over an extended period of time with a lot of distinctive projects as proof" (P 78).

Organisational members believed that Alpha was highly regarded in the market and its services could be recommended to others: "Definitely a company to be used for a project" (P 15). Another participant, who had only been with Alpha for two years and was previously with a municipality using Alpha's services, provided a perspective as a former "outsider": "As I am involved with Alpha for two years as employee, I wish to mention that while I was with Makhado Municipality we appointed Alpha on various projects and my experience with Alpha was based on the fact that Alpha was trustworthy, and was always totally committed and had a lot of expertise" (P 51)[3]. Furthermore, members believed Alpha to be a source of competition amongst similar firms: "Alpha is reputable in the market for implementing infrastructure projects in a professional manner, taking into cognizance the needs of the beneficiaries that is the client and community" (P 27). Furthermore, Alpha and its services were viewed as providing a source of

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[3] There are some good examples of "identity work" in this paragraph as participants draw on supposedly "outsider" positions, being part of the "Makhado Municipality" and "fellow friends discussing" to promote ostensibly "objective" perspectives which promote the expertise, commitment and trustworthiness of the firm. In doing so, they are providing excellent examples of what Albert and Whetten (1985) describe as identity statements being a political-strategic act.

competition: "Any tender that we submitted, you hear fellow friends discussing that we are amongst their threats… so I guess out there we were competitive" (P 46).

One member explained how important staff were in conveying the image of the organisation: "They take good care of their image through their employees, yet those who're still new in the industry tend to take some time to reach such stages of 'carrying the image in the best way possible'" (P 44). While not a reference to identity specifically, image was viewed as the outward manifestation of organisational identity, and the extract emphasised the role of staff in promoting a particular view of the organisation. It also hinted at a socialisation process that took a fair amount of time and successive stages to instil the tacit knowledge needed for staff to project the "correct" view of the organisation. This highlights the control function of organisational identity. A similar idea was raised in the next identity statement where the participant suggested that "to get joy out of the company" one should be referred to the "right" person, as not all employees were up to standard.

But there were also some "dissonant voices", one of which suggested that despite the company's reputation being good, there were nevertheless negative attitudes towards the it: "good although there were several instances of very negative attitudes for no apparent reason" (P 64). The other suggested the firm was not as reactive as it could be: "representing excellence but not always as reactive as we could be" (P 24). Finally, one particpant suggested that: "awareness amongst the general public seemed to be limited – this was probably more pronounced in Cape Town than in Pretoria where the company had a bigger footprint and attracted more of the projects in the public eye" (P 10). This suggested that while the firm was well-known in the industry, it was less so to the general public, highlighting the contextual constraints in identity.

With regard to Beta, we have chosen to include a description of the identity narrative "We are the "grand old lady" of South African consulting engineers". The name of this identity narrative is drawn directly from one of the responses to the question regarding reputation: "highly professional and well respected, sometimes termed 'the grand old lady' of South African consulting engineers" (P 136). These descriptions are included verbatim below.

*4.1.2 Beta We are the "grand old lady" of South African consulting engineers[4]*

Although the emphasis on the feminine in this metaphor is somewhat misleading, as paging through the Beta Founder[5] book, female faces were scarce and appeared mostly in the form of sisters and wives (in the early days particularly). Nevertheless the phrase "grand old lady" captured the image of something stately, elegant and old, almost timeless. The firm was certainly one of the oldest in the country and despite being predominantly male-led, promoted "old fashioned values" such as providing excellent services even when this was not profitable; building close relationships with clients; keeping "the family" close and, like many old ladies, struggling with transformation, as it attempted to adapt to a changing environment.

*4.1.2.1 We are a well-known engineering firm*

Staff members believed the company was "well-known" and "highly regarded" in the industry, and it was described as "a well-known firm that was very well respected" (P 103). Other descriptions made reference to being "very highly regarded", "highly respected" (P 106) and one even referred to its iconic status "An icon, dependable" (P 113). Another participant also mentioned the bond with Beta Founder, who was named Engineering Icon of the Century: "the emphasis will be on the opportunity we had to be involved with very interesting and 'one of a kind' type projects in the water field and our bond with Engineering Icon of the century, Beta Founder. For a technically orientated engineering mind highly rewarding!" (P 131). One participant maintained that many appointments were influenced by the Beta Head brand: "Technical standard of work was first priority, above profit on projects. Many markets were very well established and we received many appointments just on the Beta Head name. The importance of the Beta Head name was also highlighted at the 75th Anniversary Client Function, in a speech by the Chairperson of Beta Holdings "Firstly, we are proud of our name, and I mean it quite literally in this instance: the name "Beta" is synonymous with civil engineering in this country and our founder, Mr Beta Founder, was in 2004 voted

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[4] We have included a description of this identity narrative to provide some context for what may, otherwise be a rather obscure reference. We have not done the same for the Alpha narrative as this was fairly straightforward.
[5] The founder of Beta was a well-known engineer, and instrumental in conceiving and driving some key water-related projects in the country. The company had commissioned a book telling his story.

the engineering icon of the 20<sup>th</sup> century by the civil engineers in South Africa"
(Betabrief). The importance of a name or brand in the context of a professional
firm is particularly important given the nature of the industry that - in the absence
of clearly measurable evaluative criteria or where these are only possible over an
extended period of time- often relies heavily on a strong brand identity to retain
clients (Alvesson 2001).

Given the nature of data collection, the data set was relatively rich. While it cannot be compared with a "thick description" gained in case study or ethnographic research, the internet-based survey proved valuable in gathering data about the organisation's identity, from a wide range of members, representing various geographical locations. In this way, many participants were given a "voice" with which to express their views of organisational identity, something we have attempted to capture by means of the identity statements. Whilst generally there was consistency across the data with regard to the identity narratives, there were some dissonant voices and we paid particular attention to these, precisely to give credence to the diversity of perspective. For example, an element that came to the fore in one of the heritage organisations was that of transformation. While one of the formal identity claims, expressed through a statement of values, was "We celebrate our diversity as well as the exceptional talents and skills among us", one of the participants suggested that this was certainly not embraced and demonstrated by all organisational members. He described the organisation as "Lilly (sic) white, with some people still clinging to their previous rights. An organisation trying to transform but finding it difficult in the new era, with some people who have embraced the spirit of the new era wholeheartedly…" (P 97). Here we were helped by the demographic information regarding the participant, as well as diversity and transformation narratives situated in the national context of South Africa.

## 4.2 Reflecting on the value of the questions

Not all the questions were equally useful in accessing identity, some proving particularly helpful, while others less so. Responses to the question on values were typically restricted to one-word answers, though this nevertheless gave us a good idea of what each participant viewed as critical in their heritage organisation. The question on culture was particularly useful as many participants provided a brief description – typically a sentence or two describing their organisation, highlighting aspects that for them were central. The question regarding successful staff and staff relations was particularly valuable in clarifying identity dimensions, as there is assumed to be a

close relationship between the characteristics of the organisation and the qualities required by staff to achieve these (Hogg and Terry 2000).

Questions related to clients and stakeholders led to some surprising answers, for example: "strangers we needed to establish relationships with to become friends" (Clients: P 26) and "full of priceless experiences" (Stakeholders: P 44). These unusual responses to what can be considered a "normal" part of organisational life, led to these elements being included as distinctive facets of identity. The questions regarding management, leadership and management-staff relations were particularly relevant in understanding the dynamics surrounding employee relations, but also opened up the themes of development related to the professional environment. These questions also highlighted a mixed identification amongst participants,  attributed to the fact that participants reported to different managers with diverse management styles. Many participants compared their sections / departments both favourably and unfavourably with others, indicating that they had their own section in mind when answering the question. This highlighted the fact that the organisation is not an amorphous mass but rather a collection of identification points at varying levels, providing employees opportunities to identify or disidentify.

Others referred more generally to the management and leadership style in the organisation as well as staff relations generally. There were thus different interpretations given to the meaning of "leadership", "management style" and "employee relations", some focusing on their immediate section, others on the organisation more broadly. Future versions of the questionnaire would need to clarify on which level participants should focus when answering the questions. In addition, the meaning of the terms "management" and "leadership" were interpreted in numerous different ways and would certainly benefit from more detailed clarification in future versions of the survey.

The question regarding differences was not as helpful as expected, as many participants responded as "unsure" or "don't know", or "very little difference". Given that the organisations were chosen precisely for their similarity, this is perhaps understandable. Furthermore, it is likely that not all of them knew the other company well enough to comment in detail about differences. Nevertheless, some participants provided a very detailed "analysis" of the differences, which proved very informative. These were helpful in "checking" the differences that emerged when comparing the narratives. Interestingly, the question regarding management systems was particularly helpful in highlighting differences between the companies, even though this was hardly the intention. The reason was that Alpha's strong business orientation was underpinned by

generally excellent management systems, and the obvious difference in the systems reinforced the difference in business orientation.

The questions that were most helpful in "getting to" identity were those related to what is distinctive about your organisation (company motto), emotional connection and the cocktail party / plane question. Several participants who had provided fairly short responses (usually a word or two) to the previous questions, often responded far more fully to the latter questions, writing a sentence or even a short paragraph. The question regarding what was distinctive about the organisation, gave participants the opportunity to highlight key issues they felt set their heritage organisation apart, and was thus helpful in understanding the distinctiveness of identity. It didn't require knowledge of the other heritage organisation, so participants were able to respond more easily. Some went so far as developing their own version of a company motto, though these were in the minority, and most participants resorted to more formal identity statements.

The response to the question regarding emotional connection was revealing as it gave an indication of just how strongly members identified emotionally with their heritage organisation, supporting Harquail and King's (2010) assertion of the value of emotion in understanding organisational identity. It also suggested an exercise in nostalgia as described by Brown and Humphreys (2002). Some indicated little or no emotional identification, for example: "No emotional bond to speak of" (P 21) which was on occasion linked to the merger. Nevertheless, the data from both heritage organisations included responses indicating a deep emotional connection with the organisation, and often included anecdotes and stories as to why this was so, as illustrated below:

> "I am still rather emotional about my emotional connection to Beta. I worked for Beta under a year when diagnosed with cancer and had to be off work for some time. The support, hospital visits from directors and fellow staff members renewed my faith in companies. Beta did not just say they valued their staff they actually did. Honesty also to me is something of great value, the management never lied or tried to beat around the bush, even if it is not what you wanted to hear at least you knew you could trust it" (P 84).

In developing future versions of the survey, we would retain all the questions though adapt them as described in the discussion above.

# 5   Discussion and conclusion

The application of these descriptions are multiple, as organisation identity provides the basis for so many actions in organisations; for example, organisational change (Chreim 2005; Backer 2008), relationships between organisations and their stakeholders (Brickson 2005), strategic decision-making (Dutton and Dukerich 1991; Riantoputra 2010); identity reconstruction (Kjærgaard *et al.* 2011) and competitive differentiation (Van Tonder 2011). Whilst organisational management and leadership may have a clear idea of the formal identity claims and statements, the clarity of these amongst organisational members may be doubtful, as well as the extent to which they identify with these. For this reason it is important to have a mechanism by which to access the organisation identity as viewed by all organisational members.

The development of the narratives and their associated identity statements also sheds light on the question of the distinctiveness of organisations in the same industry. Some authors have asserted that especially those within the same industry will have a similar identity as "identity is category" (Gioia and Patvardhan 2012, p. 55). In this study, the heritage firms operated within the same industry and had been chosen as mergers partners precisely for their similarity. Although the heritage firm's narratives centred around three broad areas, namely standing within the industry, professional-client relationships and relationships amongst members, there was nevertheless sufficient difference between the merger partners to argue for distinctiveness in organisational identity even within firms in the same industry.

Limitations of the internet-based qualitative survey include the lack of access to respondents to follow up on interesting responses or answers that were unclear. One possibility would be to develop a means of interacting with survey respondents in an anonymous way, to further explore elements of the data, much like the internet-based forum used in Coupland and Brown (2004). Furthermore, while the internet-based format provided access to a wide range of (potentially) diverse perspectives from organisational members, these perspectives have not been confirmed through participant observation, as would have been the case with ethnography or a case study.

In conclusion, the internet-based open-ended qualitative survey made it possible to provide a narrative description of two heritage organisations' identities. The identity narratives represent

the broad consensual constructions regarding the organisation, reaffirming the commonality and "centrality" associated with organisational identity (Gioia *et al.* 2000; Hatch and Schultz 2002). Using broader identity narratives with identity statements within these, we were able to capture clusters of identity statements which served as members' working definitions of identity (Corley *et al.* 2006). The multiplicity reflected in these clusters allowed for various facets of organisational identity to be captured, much like the various selves in the personal identity of an individual. The plurivocity associated with these descriptions did not necessarily imply fragmentation but rather that these organisations are characterised by "sets of stories that have certain commonalities, such as key themes, core events and imposing personalities" (Brown 2006, p.16).

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**Table 1: Open-ended survey questions**

| Questions |
|---|
| *For me the three core values of my heritage organisation are*: <br><br> Values are an integral part of identity because they act much like a constitution – a guideline for making decisions in line with identity, and have implications for the moral and legal parameters for identity (see also Bronn *et al.* 2006; Alvesson and Empson, 2008). |
| *My organisation's culture could best be described as (culture is viewed as the generally accepted way of doing things in an organisation):* <br><br> To ensure that people understood what was meant by culture in this context, we added a brief descriptor: *culture is viewed as the generally accepted way of doing things in an organisation.* Culture is often termed "the way we do things around here" and refers to the practices and routines organisational members engage in and which are assumed to reflect organisational identity, which is embedded in culture, acting as symbolic context for its development and maintenance (Hatch and Schultz, 1997) (see also Alvesson and Empson, 2008; Albert and Whetten, 1985). |
| *In my heritage organisation, change is viewed as*: <br><br> The relationship between organisational identity and change has been a focal point in OI research (Backer, 2008; Corley, 2004; Corley and Harrison, 2009). Change is an integral part of the environment in which organisations function and the capacity to adapt to change has affected the continued survival of some high-profile organisations. The question was included to get a sense of the degree to which change is seen to be an integral part of identity or not. |
| *I would describe successful staff in my heritage organisation as:* <br><br> The logic underlying this question is that staff who embody the characteristics of the organisation should be seen to be the successful ones (see for example Alvesson and Empson, 2008; Hogg and Terry, 2000). The aim was to understand what is perceived as success, so as to understand what characteristics are viewed as embodying organisational identity. |
| *I would characterise staff relations in my heritage organisation as:* <br><br> Given that organisational identity is given life through interactions, descriptions of staff relations should constitute something of the identity of the communal, reflecting the shared values and beliefs regarding how people "should" act. |

| |
|---|
| *I would characterise client relations in my heritage organisation as:* |
| Much like relationships with internal members, the nature of client relations and attitudes of employees towards clients should constitute part of their identity (see Alvesson and Empson, 2008). |
| *Relationships with external stakeholders could be described as:* |
| External stakeholders form an important part of work processes, especially within the engineering industry in South Africa (ECSA, 2006), and was thus included as a dimension in the questionnaire. |
| *I would describe my heritage organisation's reputation in the marketplace as:* |
| Reputation refers to the signification that the company is subject to, based on its institutional and physical context, and its relationships within this, thus constituting a significant element of identity (see Alvesson and Empson, 2008). |
| *I would describe my heritage organisation's service in the marketplace as:* |
| The products or services an organisation produces or offers are central to the purpose of its existence, and for this reason, service is a critical element of identity (see Alvesson and Empson, 2008). |
| *The management style in my heritage organisation could be described as / The leadership in my heritage organisation could be described as:* |
| Leadership and management are considered to be critical influences in the construction and maintenance of identity, and should provide an important source of information regarding identity (Albert and Whetten, 1985). We decided to use both terms to access meanings associated with both management and leadership. |
| *At my heritage organisation, the relationships between management and employees could be described as:* |
| Like other relational elements of the organisation, management-employee relationships provide a clue as to what is modelled as acceptable behaviour central to identity (see Alvesson and Empson, 2008). |
| *I would describe the management systems in my heritage organisation as:* |
| This was an element suggested by Bronn *et al.* (2006) as well as Alvesson and Empson (2008) and was raised by the HR Director, as it was an area in which the two organisations differed significantly. It proved to be a valuable addition in terms of understanding identity. |
| *If you had to, in one short phrase, summarise what was distinctive about your heritage organisation, what would that be? (Think of it as devising the company motto):* |

This question was drawn from Brickson (2005) and in contrast to the previous questions in which we had provided a dimension in which to comment on; in this question, they were free to highlight aspects they deemed crucial in making sense of their organisation. Also important here was the emphasis on "distinctive", attempting to get to differences between the organisations.

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*In what key ways would you say that Alpha and Beta differ?*

We were concerned that, due to the merger process which relied on similarities between the two heritage firms, the differences between the two may not have been apparent. By including a question on differences, we prompted participants to consider those aspects that, in their view, were truly unique about their organisation. The idea of difference is also related to distinctiveness as a characteristic of identity.

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*Describe your emotional connection to the organisation:*

In his metaphor of identity as an onion, Whetten uses the peeling back of the layers of the onion and the subsequent tears to be a good illustration of the importance of emotion in identity (In Albert *et al*. 1998). For this reason, a question regarding the participant's emotional connection to the organisation was included.

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*Imagine you meet someone at a cocktail party or on a plane. What would you say about your organisation?*

Much like the motto question of Brickson (2005), the final one allowed participants the freedom to express elements of their organisation that they may not have had the opportunity to voice.

**Table 2: Quotes associated with Beta identity statement "We are numbered amongst the best in our field"**

*As good as any*: "as good as any" (P 109)
*One of the best*: "One of the best" (P 111)
*Company aimed to be the best*: "The company aimed to be best in its field – technical excellence was very high in a number of the older guys" (P 93)
*Best consulting engineers in the water field*: "Due to our depth of civil engineering knowledge, especially in the water field, we can provide the best consulting engineering service in South Africa. I would definitely inform the other person of the instrumental role which we played in the Lesotho Highlands Projects" (P 77)
*Best in its business*: "best in the business" (P 104)
*Best of civil consulting engineers in SA*: "among the best of civil consulting engineers in SA" (P125)
*It was the best*: "It was the best" (P 134)
*Numbered amongst the best*: "I work amongst a company of people who I find inspiring in every way, and who have helped me become a better person. We love our work and by Providence, have been numbered amongst the best in our field. The future is always uncertain, but it is good to be facing it with a team like this, that has so much more potential to build into, to take on opportunities that will arise" (P 126).
*Beta best albeit expensive*: "My experience in government tender committees bears out the reputation of Beta as the best company, albeit the most expensive. Where top quality work was needed, in particular where a legal challenge may occur, then Beta would be the company of choice because the products would be technically and legally defensible and this was widely known in government" (P 94)
*Of the highest order*: "Of the highest order. Our reputation was everything" (P 112)
*One of the best*: "One of the best: (P 129)
*Technically excellent civil consulting engineers*: "technically among the highest of civil consulting engineers in SA, with lower reputation on transformation" (P 125)
*Strive to be the best*: "Always strive to be the best among competitors" (P 108) (culture)
*Doing it to the best of your ability*: "Doing it to the best of your ability" (P 119)(culture)

**Table 3: Overview of heritage firm's identity narratives and statements**

| Alpha | Beta |
|---|---|
| **We are an industry leader**<br>• We are a leading company<br>• We are a highly regarded engineering company<br>• We are the biggest and the best but tend to be bureaucratic<br>• We are a muli-disciplinary firm with a global reach<br>• We are business-focused<br>• We are always moving forward | **We are the "grand old lady" of South African consulting engineers**<br>• We are a well-known engineering firm<br>• We are numbered amongst the best in our field<br>• We are a leader in the field of water engineering<br>• We are reputable purveyors of engineering expertise |
| **We are client-focused professionals**<br>• We are professional in our approach<br>• We client-focused<br>• We are driven to deliver quality service to clients<br>• We are committed to working with relevant stakeholders | **We are the consulting engineering company with a heart**<br>• We are firstly engineers<br>• We are professionals<br>• We are a company that puts the client first<br>• We are civic minded |
| **We are a people orientated company**<br>• We are a company that cares for its people<br>• We are happy working together<br>• We are a value-driven company | **We are family working to engineer a better future for all**<br>• We are a family<br>• We are a company that values our people<br>• We are focused on the development of our staff |