Organizational Identity and Strategy: An Exploratory Study of Parallelisms

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ABSTRACT

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Sophie A. Vézina

The goals set by an organization and the plans, resources and people deployed to work towards these objectives have an impact on firm performance and ultimately firm survivability. An organization's identity, what is central, enduring and distinct about a firm may also have an impact on firm performance and ultimately its survivability (Albert & Whetten, 1985). A neglected area of study, the relationship between strategy and organizational identity, will be the core focus of this exploratory study.

This thesis aims to explore whether parallelisms between organizational identity and strategy exist, and whether these parallelisms may affect firm performance. Using the constructs of Organizational Identity Orientation (Brickson, 2005; Brickson, 2007) and Strategic Typology (Miles & Snow, 1978), the research questions are explored through a multimethod approach. 25 firms in the Information Technology consulting industry in Ottawa participated in this study; a top management representative from each firm participated in an interview and completed a questionnaire. Qualitative and quantitative results suggest support for some parallelisms between the constructs, such as the compatibilities shared between Relational organizational identity and Defender strategy. Limitations of study are discussed, and propositions for future research are developed and contributions to the field explored.

ACKNOWLEDGEMENTS

"Did you hear I finally graduated?"

"Yeah, and just a shade under a decade too. All right."*

"You know a lot of people go to college for 7 years."

"I know, they're called DOCTORS".

-Tommy Boy**

My deepest gratitude to my supervisor, Dr. Mehdi Farashahi, who was patient and encouraging; thank you for lighting in me the spark of passion for strategy literature. Thank you to my committee members, Dr. Linda Dyer and Dr. Kai Lamertz, your dedication to your respective fields and to your many students has been a source of inspiration. All three of you have influenced me with your love of research; I wish you many more years of great academic adventures.

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Finally, I wish to extend a heartfelt thank you to all those in the Ottawa community who made this thesis possible. You shared your time and thoughts, without which this thesis would not have existed; best of luck for continued success in all that you do.

* Note: It did not take me 7 years, although it sometimes felt as though it might.
** Segal, P. (Director). (1995). *Tommy Boy* [Motion picture]. United States: Paramount Pictures.

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INTRODUCTION

Strategy and Identity: A Need for Further Understanding

Mintzberg (1987b) compared a company with no strategy to a person with a bland personality; they are unknown and unknowable. The need for a forward-thinking decision-making tool, a strategy, has been proven to far outweigh the benefits, such as a limitless but ill-defined pool of opportunities that the absence of strategy would provide for the firm (Ansoff, 1965). The strategy field of research has elaborated and refined a variety of theories, empirical findings and frameworks with the goal of advancing our understanding of the concept of strategy. Additionally, the field's other goal has been to advise practitioners, the decision-makers, of the results of such findings in the elusive search of a solution as to how and in what form strategy may best be applied to firms in order to enhance performance. A budding, adolescent concept (Corley et al., 2006) that can be of useful in furthering strategy research is that of organizational identity. Organizational identity provides answers for leaders and members to complex and ambiguous questions related to the firm's existence, an issue called into question when leaders are faced with difficult decisions. Organizational identity seeks to answer deeply rooted questions, such as "Who are we?", "What kind of business are we in?", "What do we want to be?", and provides statements to guide the discovery of these answers by highlighting what is central, enduring and distinct about the firm (Albert & Whetten, 1985). Without a stable identity, the firm may be "undistinguishable, unrecognizable, and unknown" (Whetten, 2006, p.223). Organizational identity offers more than a decision-making tool by providing an understanding of the firm for members and other stakeholders (Scott & Lane, 2000).

Researchers' interest has been piqued as to the relationship between organizational identity and strategy however models of that relationship have been varied. Andrews (1980) argued that the chief determinant of the firm should be strategy, not its history or the background of its leaders, concepts which have been tied to the conceptualization of organizational identity (Albert & Whetten, 1985), although Andrews conceded that all other elements are "serving as the conscious embodiment of strategy and the harbinger of growth to come" (1980, p.119). In contrast Young advocated that identity is a deeper concept than strategy which "integrates, supports, and indeed drives a number of operative concepts guiding the long-term direction and character of an organization" (2001, p.143). Rylander and Peppard (2003) described identity as an "interpretor" or "translator" of strategy. This study does not seek to take sides in the debate of one concept's primacy over the other, rather it seeks to explore the dynamic which exists between strategy and identity.

It has been acknowledged that past firm behaviour is the best predictor of future behaviour (Smith, Ferrier & Ndofor, 2001); a firm which understands the behaviour of its competitors may best plan its counter-attack. Similarly, it has been stated that who we are, our identity, influences our decisions and behaviour (Lerpold, Ravasi, van Rekom & Soenen, 2007); a firm which understands itself may be able to leverage the strategic value of its identity (Pratt & Foreman, 2000). Strategy and identity both offer a way of understanding the firm and its interactions with the environment and both can be used as a decision-making tool. If when used independently these concepts are useful tools of analysis or prediction for a firm, it is possible that combined, their abilities become exponentially increased. If this premise holds true, should these concepts within a firm "get along"?

Evidence suggests that disagreements about identity may be disruptive for an organization, causing strategic intent to be diffused throughout the organization according to personal interpretation (Voss, Cable & Voss, 2006). Kjærgaard's (2009) longitudinal study suggested that organizational identity ensures consistency in strategic actions by providing guidance to members as to what is considered acceptable behaviour by the firm. Ackerman (2006) noted the risk of disconnect which may occur when strategy is constructed without consultation or alignment to identity. These findings contribute to our understanding of their interrelationship, however little is known about how these concepts may interact and together influence firm performance.

He and Balmer (2007) recognized the need to peer into the "black box" of the strategy/identity dyad. Both are decision-making tools which enable a firm to navigate its relationship with the external environment. The interconnections implied do not suggest that strategy and identity are one and the same; in fact quite the opposite is true. A strategy is not an identity and an identity is not a strategy. Strategy is the planned use of available resources in all its available forms (e.g. human, material, knowledge-based) in order to achieve an organizational objective. Organizational identity is the root knowledge of firm's self as separate or similar to other firms. Both concepts guide organizational decision-making based upon the fragmented knowledge they provide about the internal and external environment and the envisioned future of the firm. Each has their benefits as a tool in the formulation, adaptation and comparison of the firm to its environment, which includes competitors, clients and other stakeholders.

At key critical moments in the firm's life cycle decision-makers will face problems that call for choices that are either strategic in nature, concern identity, or both. As both these concepts in the firm drive and feed decisions, it is plausible that a certain amount of co-alignment between the two can, and possibly should, exist. What can occur if a firm makes decisions related to resources, structure and its chosen market that are inconsistent and incompatible with what it holds to be most true and persistent about itself? Can a firm make significant, shifting choices using one decision tool that does not correspond at all with the "right" alternatives as provided by the use of other decision-making tool? In light of how little we as researchers know for certain about which strategies and organizational identities are the right choice for any given firm, how can decision-makers navigate these difficult decision situations? This study seeks to explore two key questions:

What similarities should exist between a firm's strategy and identity? How will this affect performance?

Strategy researchers must seek answers that can define the grey area that exists between the two concepts as well as to solidify where their boundaries lie. Does "getting along" translate into common ground shared between these two constructs? Does it matter whether a firm possesses this common ground, this relationship between strategy and identity? This study seeks to define preliminary shared boundaries between the two by exploring what parallelisms[1] may exist between the two decision-making tools as illustrated in Figure 1.

[1] Here parallelism is used based in part in the metaphysical sense of the term whereby "mental and bodily processes are concomitant; each varying with variation of the other, but that there is no causal relation of interaction between the two" (World Book Dictionary, 2003, p.1511). I borrow from this definition loosely but my intention is to use "parallelism" as a term which captures my perspective on the relationship of strategy and identity.

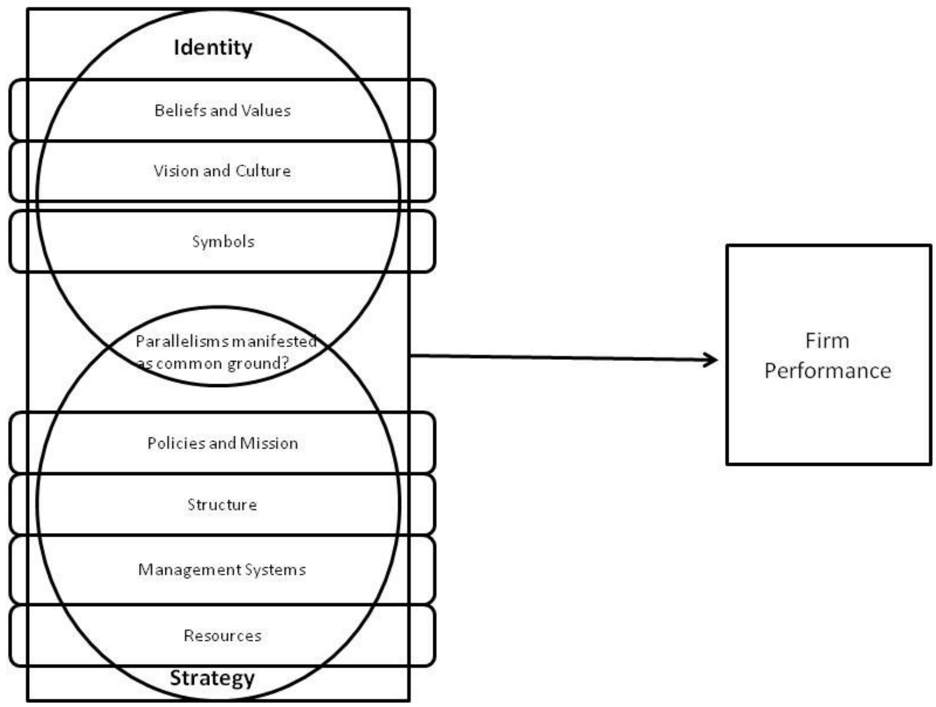

Figure 1: A simplified model of the theorized parallelism between strategy and identity, with link to performance.

Figure 1 illustrates a “snapshot” of the fluid relationship of parallelisms. In motion or over time, the elements of this figure are anticipated to move in synchrony, each mirroring what the other is doing. When perceived through a static lens, the parallelisms shared between the two concepts may be exhibited as shared characteristics, or manifested as common traits that are observed from both a strategic and organizational identity point of view.

Granted, this model is simplified for the purposes of this exploratory study. The components of each key concept, such as symbols in identity and resources in strategy, are illustrative not exhaustive. These components have been rank ordered from the top of the model to the bottom in order of most latent to most manifest components of identity and strategy respectively. This is to give the reader a better sense of the tangible and intangible nature of each concept.

Several key factors that play into the process of strategy/identity onto performance have been intentionally disregarded, not for lack of importance, but for parsimony. First, the question of time is not addressed; as noted this simplified model provides a snapshot of the interaction, not the interaction process itself. Second, the model does not provide clues as to the antecedents of identity and strategy formulation. Third, key interaction variables which likely covary with identity and strategy, and moderate the relationship between these two constructs and performance are not included. Such variables may include external environmental factors and internal firm-based factors such as size or age of the firm. Lastly, the model is not dynamic in that it does not explain feedback mechanisms such as a firm's evaluation of its performance and subsequent strategy or identity re-formulation (Farjoun, 2002; Narayanan, Zane & Kemmerer,2011).

Several assumptions about strategy and identity are made to contextualize this study. First, the model in Figure 1 suggests that identity and strategy are singular, although the literature suggests that multiple identities are likely not only more prevalent but inescapable (Albert & Whetten, 1985). Second, organizational identity is framed in the social actor perspective, emphasizing members' beliefs about the organization, which "treat organizational identity as a set of organizational characteristics that exist, that members may or may not all believe, and that can be experienced, assessed, appreciated, and possibly managed" (Corley et al., 2006, p.90). Third, as strategy formulation is primarily a top management team concern (Hambrick & Mason, 1984) organizational identity is also framed from a "sense-giving" perspective whereby identity is communicated in explicitly stated views on the firm, often emanating from top management, that guide organizational members' understanding of the firm's identity (Ravasi & Schultz, 2006). Lastly, the statements in this study borrow from the anthropomorphist view of the firm but only for purposes of flow and clarity of thought. The ideas put forth in this study do not assume that firms are identical to people because to do so would assume that the whole is greater than the sum of its parts. The perspective towards firms, their identities and strategies taken in this instance borrows from Mintzberg: "Strategy in this respect is to the organization what personality is to the individual" (1987a, p.16).

Strategy and Identity: Research Questions

Exploration of the strategy/identity dyad, as it has been articulated in this study, is warranted for three reasons. First, the literatures on strategy and organizational identity share a natural compatibility in that each seeks to observe and explain a firm's actions, the players involved and the firm's interactions with the external environment. There is merit in aggregating and synthesizing ideas between the two paradigms. Second, social identity theory suggests that individuals tend to select activities that are congruent with the salient aspects of their identities, a process which can be extended to organizations (Ashforth & Mael, 1989). An argument can be made that if one tends to select activities that are congruent with the self, organizations also tend to select activities (i.e. strategies) that are congruent with their self (i.e. identities). The unease of engaging in activities and behaviours that are incongruent with the self has been documented in individuals (Festinger, 1957); can the same not be extended to an organization which engages in activities that are incongruent with its defined self? Research suggests a lack of congruence between organizational identities may impede members' identification with the firm (Ashforth & Mael, 1989). The impact of mismanagement of multiple identities on firm performance has been documented (Voss et al., 2006) however the literature has not yet demonstrated how a lack of congruence between a specific strategy and a specific identity would impact the firm. Third, strategy and organizational identity literature have each captured their concept's role in impacting firm performance, although the strategy literature has far outpaced the empirical-based evidence of its identity counterpart. There is then value in searching for a combined impact between these two factors and performance. The first research question this study will explore:

RQ1: What parallelism(s) should exist between a firm's strategy and identity?

Chandler (1962) discussed the failure at the decision-making level to integrate strategy, in some instances due to management which is too focused on the day-to-day operations to identify the firm's long-term needs. Miles and Snow documented an unstable type of firm which inconsistently responds to its environment due to several sources; management's failure to articulate a clear strategy, a strategy which is not properly linked to the firm's structure, processes, and systems, or management's reliance on a particular strategy/structure relationship that is no longer relevant in the existing environment (1978). As support exists for the separate impact of identity and strategy on firm performance as distinct agents of change, it is assumed that the confluence of these two concepts must also affect change on firm performance. Ackerman stated: "[…] identity has a profound bearing on what you can and cannot do with your life. This holds for companies as well as people." (2006, p.266). In his perspective, strategies which are disconnected from the identity of the firm do not succeed, much as individuals who do not recognize their limitations fail to reach their lofty and ill-conceived goals. The mismanagement of one or both concepts may then lead to the organization's failure to adapt or ultimately its demise. This leads to the other research question which this paper will address:

RQ2: Are parallelisms between organizational identity and strategy reflected in firm performance?

Purposes of this Study

The goals of this exploratory study are threefold. First, an overview of the strategy and organizational identity literatures will be provided to give context to the study and enhance the reader's understanding of both concepts. The strategy literature has been punctuated by two large schools of thought: the mechanistic perspective, based on rational, economic or single factor models of theory building and the organic developments which have promoted a more "natural", integrated and interactive approach in developing strategy theories (Farjoun, 2002). Both perspectives have introduced factors that impact strategy formulation, its ongoing assessment and subsequently strategy theory evolution. A similar overview of the organizational identity literature will be provided. Second, this study will operationalize the variables of interest in this study, namely identity, strategy and performance, so that the research questions can be explored through a multimethod study. By trialing specific operationalizations of the concepts under the study, the researcher hopes to shed light in determining the best research design, method and sample in order to provide definitive conclusions; if these decision-making tools "get along", they should possess some convergent validity. Lastly, the findings of this study will be analyzed and interpreted to develop propositions to explore the relationship among the main constructs as the foundation for future research. Contributions to the fields of strategy and organizational identity research will also be discussed.

STRATEGY AND IDENTITY: OVERVIEW OF THEORETICAL DEVELOPMENTS

Mechanistic Views of Strategy

The first explorations into the heart of strategy were based on economic rules of perfect competition and the philosophy of profit maximization. For its time, the economic theory of the firm allowed researchers to focus on the rise of industrialization while applying rigorous scientific method to a new realm, the organization. In the era post World War II Chandler (1962) chronicled the evolution of industrial giants in an effort to capture the history of development of large enterprises. His findings captured the advent of the now traditional model of business administration, the decentralized structure which allowed for various centres of coordination, appraisal and planning. Chandler described day-to-day management decisions as taking place at lower levels within the organization whereas “entrepreneurial” decisions were left to higher levels within the organizational hierarchy. These entrepreneurial decisions were in effect the strategic drivers of the organization, which determined structure.

Chandler (1962) noted that size, environment and technology influenced decisions involving structure. These factors determined the choice in strategy (and thereby structure) that was allowable within a given organization. He maintained that if correctly implemented a match between strategy and structure could improve performance. This deterministic perspective removes the individual agent of choice from the strategy formulation, although he did not imply that individuals were not involved in elaboration of a corporate strategy. Rather, this perspective suggested that strategy formulation should guide the development of structure and the processes affecting organizational behaviour without the influence of external factors such as the external environment, a firm’s past history (Chandler, 1962) or the background (and therefore values, norms and beliefs) of individual decision-makers (Andrews, 1980).

Early researchers omitted factors such as decision-makers and their personal backgrounds in the development of strategic management theory in favour of factors that were deemed more crucial to the process, such as the resources which could be made available to the organization. The resource-based view of the firm was premised on assessing the attributes and weaknesses of the firm, together with a rational, economic perspective, which could determine a firm's position on managing its resources which in turn shaped strategy formulation (Wernerfelt, 1984). Resources in this perspective could be tangible or intangible assets such as reputation and could be known or unexplored creative territory for the organization as long as they were rare, valuable, difficult to copy and non-substitutable (Oliver, 1997). Strategy in this perspective is therefore shaped and gauged by these available resources or, unfortunately for some organizations, the fact that a position barrier was created by a competitor with these same resources which can lead the latter to greater firm performance.

This economic model however did not attribute enough credit to the behavioural expectations set out by firms; organizations are made up of motivations, cognitive assumptions and decision-making models based on the individuals found therein. Moreover, not all firms operate in an effort to maximize profits (Jarvis, Curran, Kitching and Lightfoot, 2000). Cyert and March (1992) developed the behavioural theory of the firm which focused on exploring how perceived threats facing the organization are resolved in order to adjust organizational goals (i.e. strategies). Organizations avoid uncertainty by anticipating events in their short-term future and planning set, short-term solutions for these unknown events. This uncertainty avoidance is manifested through reliance on standard operating procedures, organizational traditions or rituals, and best practices in industry. These threats to the organization and their solutions are identified using "problemistic search" which relies upon what is known, what is in the vicinity of the identified issue, and what has been successful in previous attempts (Cyert & March, 1992).

This limited search is further compounded by the perceptual lens of the leaders, which may limit or avoid the exploration of certain alternatives. In this sense, strategy was viewed as a position, an ingrained way of perceiving the world which belongs to those in the dominant coalition (Mintzberg, 1987a). If the search is not immediately successful, the organization can resort to complex search in its vulnerable areas (Porter, 1979). Cyert and March (1992) also theorized that organizations were capable of adaptive behaviours whereby they learned to refocus their attention and search capabilities over time based on their own past successes and failures by those of other players in the industry. This idea of adaptive behaviour was better fleshed out in the population ecology perspective as outlined in the organic perspective (Farjoun, 2002).

The mechanistic perspective of the firm as outlined in these theories captures in essence that firm performance is affected by strategy, by internal attributes such as resources and structure as well as by the environment in which the firm exists. These theories have enjoyed empirical support; the resource-based view in particular has been explored in various settings. Newbert (2008) found that as the value and rarity of resources increased for micro and nano-technology firms, so too did the firm's competitive advantage, which significantly mediated the link between resources and performance. A meta-analysis of key findings of resource-based research suggested a significant relationship between strategic resources and performance (Crook, Ketchen Jr, Combs & Todd, 2008). In an interesting development, Weigelt (2009) used the practice of outsourcing the adoption of new technology integration as an interpretation of a rent generating strategy. He found strategy to have positive effects on performance for banks however the findings indicated that banks with previous exposure to technology increased their benefit from the strategy, which suggested an adaptive component. Adaptability is discussed in further detail in the paradigm of organic strategy development.

Towards an organic perspective

The causal assumptions of the mechanistic perspective would be sufficient to explain the strategy/performance link for an organization in a more stable and predictable environment although such is rarely the case. These static theories are at odds with the complex and evolving behaviours of firms, their members, and their industries and as such have been criticized for their fragmented view of the firm (Farjoun, 2002). Cyert and March aptly wrote: “the “firm” in this theory has few characteristics; it is not a complex organization with problems, budgets, aspiring middle management” (1992, p.8). Prompted by the limitations of previous models of strategy, new ideas emerged that focused on a more organic or natural (i.e. from the source) perspective such as the strategy elaboration process which includes formulation and implementation (Mintzberg, 1987a) and theories that incorporated reciprocal interactions between firms and their environments.

Child (1972) was one of the first to promote the interactionist perspective in his rejection of the economic model of the firm. Strategic choice is a real phenomenon visible through the decisions of the dominant coalition. He argued that founders and leaders of organizations, although constrained by contextual factors such as the environment, technology or firm size, nonetheless possess a certain degree of leeway in deciding which strategy to employ – or whether to accept the contextual factors as status quo at all. Firms can choose to enter or leave a market, initiate use of a new technology or limit their size or growth; the crux of strategic choice is in deciding which approach to take to address these factors (Child, 1972). And whereas many strategic choices are possible, some may have a greater effect on achieved performance than others.

Extending the idea of strategic choice, Hambrick and Mason (1984) proposed an upper echelons perspective whereby strategic decisions are impacted by the characteristics of the decision-making individuals. Age, previous work experiences, and core values can impact the way the firm and its environment are perceived by the decision-maker. This theory pushed forward the concept of firms and their members interacting with their environment and shaping one another. The influence of individuals and leaders, their peers and countrymen, and the industry in which a firm operates all contribute to shaping each other's economic reality and consequently its strategic manoeuvres (Berson, Oreg & Dvir, 2007). The influence of these others on choices of strategy can also alter a firm's view of its performance, as an aspiration and its evaluation (Davis, 2005). Performance levels to which a firm endeavours may also reflect the risk tolerance of the decision-makers (Davis, 2005). This strategic choice perspective has been supported empirically (Hitt & Tyler, 1991) and has been demonstrated to be linked to firm performance (Baum & Wally, 2003).

Strategy throughout Time

Decision-makers' experiences and immediate environment influence their personal orientations and so does a firm's broader environmental context. Ideologies and values embedded within a particular culture or geographic area are embodied by institutions that dictate the rules of both society and state. Institutional theory articulates that institutions, whether political or social, influence strategy (Peng, 2002). These formal or informal "rules of the game" constrain organizations in some aspects, although firms have several response options from which to draw in order to incorporate these institutional pressures into their current operations (Oliver, 1991). The increasing recognition of how firms were tied to particular places and times, this “periodization” approach (Davis, 2005, p.482) emphasized the influence that prevailing social norms have on strategy and structure.

The premise of the reciprocal relationship between firm and milieu was echoed in evolutionary theory. Organizations are shaped by the context in which they are established and as such they are a product of the history, events and innovations and other firms that have existed before them and that occur at present time (Aldrich, 1979). Evolutionary processes can be applied as a framework to understand how some organizations come to be in a specific environment and define which strategies competitors are likely to use to maintain survivability in that given milieu. The processes can occur at organization or industry level and include variation from the standard, selection of certain types of variation, retention of selected variations and the struggle over scarce resources whether physical assets or intangibles such as legitimacy (Aldrich, 1979). These four processes are part of a larger holistic process of competition. Organizational ecology suggests that not all firms are created equally but that some may have similar needs, signalling a greater potential for intense competition which is supported by the existence of various sizes and structures of organizations engaged in similar activities (Baum & Amburgey, 2002). Competitors are forced to compete for survivability because despite the seemingly endless combinations of size, structure, resources and other factors that strategic choice would suggest are possible, many firms tend to congregate onto specific combinations of choices that tend to naturally complement one another. The taxonomy of choices emerge as archetypes within a given industry (Miles & Snow, 1978).

Archetypes may make similar strategic choices but as in any environment the markets they serve can only bear a certain number of competitors resulting in a constant struggle for survival. In response to the ever-shifting conditions around it, a firm can survive its ecological milieu, and out manoeuvre its competitors, through change or adaptability (Fox-Wolfgramm, Boal & Hunt, 1998). Common change hurdles include newness, firm adolescence and aging (Baum & Amburgey, 2002), much as individuals must manage their identity and "survival" by means of acquiring maturity and by navigating the life stages successfully (Erikson, 1980). In the reciprocal relationship of firm and its environment, change therefore cannot be avoided. It is thus the way in which a firm decides to change in order to adjust to its evolving environment which is critical to its survival. Change can be positive, reinforcing previous actions and maintaining a chosen strategic direction but it can also be destructive in that it can render prior decisions obsolete and may wreak havoc on the organization's practices and people (Baum & Amburgey, 2002). The difference between change as beneficial or detrimental to the firm may lie in its quantity in terms of change events, and in its magnitude in terms of resulting transformations within the firm. Acting as a filter for change, a firm's identity may provide some support through the adaptation process (Gioia & Thomas, 1996). Identity in this instance may act as a guidepost through the change process as to what elements within an organization should, or can, change over time.

Identity over Time

Organizational identity is a broad concept that encompasses statements about the organization's goals, values and reputation (Hatch & Schultz, 2000) and is experienced by a variety of stakeholders, including management, employees and outsiders (Scott & Lane, 2000). This experience translates into stakeholder identification with the firm and an understanding of "what the firm is" (Ashforth & Mael, 1989; Foreman & Whetten, 2002; Hatch & Schultz, 2002). Organizational leaders and decision-makers must attempt to define the organization's core characteristics as a guide for what the firm should do when navigating its environment and to manipulate how other elements of the environment will interact with the firm. Thus, for a firm to understand “who it is” enables it to communicate, respond to changes in its environment, and create meaningful relationships with its stakeholders.

Because these characteristics remain stable (but evolve; more on that later), they provide a frame of reference for the organization, a thread which remains constant throughout the shifts in the environment and the periodization of the firm. The core elements define what it means “to act in character” (Whetten, 2006, p.223). This guidepost is however not without its drawbacks; as it offers such an embedded perspective on the firm, it is of little use for day-to-day management decisions and activities and is best used when focused on large shifts demanded of the firm by its environment and institutions. In addition to its limited, almost punctuated use as a decision-making tool, the ambiguity of what an identity actually is or should be is difficult for decision-makers to navigate and researchers to define and observe.

Early organizational identity literature articulated two organizational identity typologies, the utilitarian and normative identities. Utilitarian firms are oriented towards economic production and driven by a desire for earnings, whereas normative firms are oriented towards cultural, educational or social purposes and are driven by ideology (Albert & Whetten, 1985). Both types of identity have their place in the environment, and are embodied in for-profit businesses and non-profits alike (Young, 2001). Yet despite the appeal of such typologies, few firms will exhibit pure types of identity. Dual or multiple identities are the norm for most firms, whether it was decided from the moment of the organization’s creation or as a slow drift over time. Holographic identities are multiple identities shared by all members of the firm, whereas ideographic identities are fragmented among various sub-groups of the organization (Albert & Whetten, 1985). Some identity statements may be compatible or complementary however others may be contradictory. Hybrid firms are characterized by identities composed of two or more elements that are unrelated or in conflict. They are distinguishable by their “incompatible, inviolate, and indispensable” identity claims (Albert & Whetten, 1985, p.267), which compounds the complexity of formulating decisions that maintain neutrality among identities, lest one be favoured over another. Despite the complexity of generating buy-in from various perspectives and opinions on “who we are”, the entanglement of various identity facets may have adaptive capabilities that work to the firm’s strategic advantage; these multiple, ambiguous classifications may render typecasting and therefore prediction by competitors of a firm’s actions more difficult if not impossible to achieve (Albert & Whetten, 1985). Maintaining discrete and separate taxonomic identities may however be more troublesome than advantageous as the parties involved with the firm may find the integration of the various identity perspectives to be too cognitively taxing (Ashforth & Mael, 1989).

An Organic Perspective of Identity

The mechanistic view of strategy proved to be insufficient to capture the complexity of the environment and the interplay between all factors impacting firm strategy and structure; the conceptualization of identity must also be viewed beyond a mechanistic perspective in favour of more fluid and broader conceptualizations of identity. If the utilitarian/normative identity perspective is set aside in favour of exploring an organic, firm-sourced interchanging view on organizational identity, then the shift towards multiple identities becomes less symptomatic of problems within the organization and more about its potentially beneficial uses to serve the firm’s purposes. In an organic view of organizational identity, pieces of identity must be flexible and take on various forms depending on why – and to whom – they are being displayed.

Pratt and Foreman (2000) conceptualized several different response options that key decision-makers have at their disposal when managing multiple organizational identities. They proposed that identities are either too diametrically opposed to be integrated or they may be capable of synergy. Depending on the decisions that leaders make regarding how to manage these separate identities they can, when factoring in other circumstances from their internal and external environment, veer towards full integration of identities to full compartmentalization as well as variations between the two. These responses can be manifested in a physical sense (e.g. moving an ideographic business unit to a different location) or integrated in the creation of myths, corporate stories and organizational image. To that latter point, Gioia, Schultz and Corley (2000) discussed the instability and relatedness of organizational image, an externally projected identity, and the internal organizational identity. As members of the organization feel identification with the firm, they are nonetheless attuned to perceptions from external members with whom the firm interacts. Should the feedback from the external members be, much to their dismay, negative it may lead to concerns over the identity as it is being portrayed. Decisions may be made to either fundamentally change the organization to match the desired and actual projections of firm identity to outsiders, modify external perceptions of identity, or to mislead the external environment into believing change has occurred through false projections of a transformed identity (Gioia et al., 2000). This manipulation of external perceptions of firm compliance to win the favour of external members has also been chronicled in the strategy literature (Oliver, 1991).

Albert and Whetten (1985) discussed the public versus private view of organizational identity. The institutional environment may have a differing perspective of the firm, however for its own survival purposes the firm will likely project a public self that is both more wholesome and cohesive than the internally perceived identity. Following the concept of public and private self, Hatch and Schultz (2000) distinguish corporate identity, the identity oriented towards stakeholders who interact with the firm, as the complement to internal organizational identity, the identity oriented towards members within the firm itself. Identity can thus range from various sub-identities according to different business units to a more monolithic identity. They promote the use of monolithic identities across marketing efforts in order to create a "reliable, recognizable and distinct portrait of the organization across its communication channels and messages" (Hatch & Schultz, 2000, p.14).

A unified externally oriented identity serves an organization in its efforts to manipulate outsiders' perceptions of the firm however it does not imply that the pluralistic nature of most firms should be abolished. Firms can manipulate various facets of their identity in order to serve multiple purposes simultaneously, and may even be able to project different organizational identities to the same stakeholder group. Soenen and Moingeon (2002) distinguished between professed identity of a firm which may not be openly declared, identity as it is currently being experienced by organizational members, and manifested identity which is exhibited in the organization over a period of time and can be traced historically. Juggling these multiple identities may therefore be a de facto requirement of a firm in a complex environment which involves various stakeholder groups such as members, decision-makers, clients and institutions. Albert and Adams (2002) proposed a balance mechanism which makes the separation between identity facets not only feasible but perhaps desirable in order to avoid cognitive dissonance. They suggested that each facet of identity can modify itself to respond to the fallibility in another facet, a way to compensate for the frustrations caused by one embodiment of identity by creating opportunities for counter-measures, whether it is alternative behaviours or opportunities for the firm and its members. For instance a professed identity may dictate that above all else, adherence to standard operating procedures must be observed whereas the manifested identity encourages organizational members to adopt work methods to suit their desired end-goals. One caveat of this balancing mechanism remains; in order to sustain the veiled dissonance, the different facets must be kept intact and separate, lest they collapse and become entangled (Albert & Adams, 2002).

Whereas theoretical benefits of adopting multiple identities have been outlined, the empirical evidence suggests that multiple identities if misused or misunderstood can negatively impact a firm's members and ultimately its performance. Foreman and Whetten (2002) studied rural co-operatives as they shared competing normative and utilitarian identity elements as both a business and a community-based institution. Identity gaps had a significant effect on members' affective commitment to the co-op and the incongruence between perceived identities of the firm led to a negative effect on firm legitimacy in the eyes of its members. These members ultimately wanted their co-ops to embody both identities by maintaining a normative form yet putting a focus on its utilitarian needs (Foreman & Whetten, 2002).

In a different industry setting Glynn (2000) was able to capture the conflicting views of organizational identity and purpose between symphony administrators and orchestra musicians: "the best orchestra we can afford" versus "a world-class orchestra in a world-class city", respectively (Glynn, 2000, p.288). Themes of mistrust, hurt and disillusionment were punctuated by a musicians' strike. Both sides felt entrenched to their respective normative and utilitarian identities, and those who remained placidly neutral on the issue fared the worst (Glynn, 2000). In another examination of the arts industry, Voss et al. (2006) examined theatres whose directors and marketers held divergent views about organizational identity. Disagreements between the two types of leaders were related to lower ticket sales, which were significantly impacted when identity divergence was extreme. Together these papers highlight the dangerous line between assimilation and integration of multiple identities and the dissolution of corporate cohesion due to the divergence of identity views. These studies however failed to articulate how, if so potentially ruinous, multiple identities could have come into existence within most of these firms over time. The answer lies not only in the conscious and deliberate changes, but also in the imperceptible movements of identities over time.

Shift and Change of Identity

The path of change is complex and difficult to map yet the evolution to a dual identity may be far less elusive. Albert and Whetten (1985) described “identity drift”: a slow and unassuming shift from a singular identity towards a pluralistic view of the firm. Many arguments support the dualistic shift; as growing environmental complexity demands new and more elaborate strategies and structures, so too must identity evolve. A firm may also gain an identity due to the introduction of new leaders, mergers with other firms or the exploration of new markets which demand new identity facets. Shifts to plural identities can also swing in favour of both ends of the normative/utilitarian pendulum. Just as a utilitarian firm may be so profoundly affected by its contributions to the community as to gain a new civic-minded facet, so too may a normative firm such as a religious-based college become more business-oriented in its desire to not only promote knowledge and values among its students, but also attract the best researchers (Albert & Whetten, 1985). The acceptance of the phenomenon of “drift” does not imply it is wholeheartedly welcomed by all firms. The drift process can often be slow and imperceptible in its day-to-day transitions until the firm “awakens” one day shocked to see how far off-track from its original core values it has shifted.

Despite the subconscious drifts that may occur, many changes and additions of identity occur in organizations at specific, salient times in a firm’s life cycle such as the formation of the firm, its growth and subsequent maturity, or surrounding critical events such as the loss of an identity-sustaining element, the accomplishment of its original goals or the prospect of a hostile takeover, or other significant threat which could lead to the end of the firm as it knows itself to be (Albert & Whetten, 1985; Whetten, 2006).

No organization can escape critical events or life cycle changes such as those described above as they are all part of the normal developmental cycle of the firm. Greiner (1972) maintained that firms navigate relatively calm periods of growth punctuated with an identity crisis that must be resolved in order for the firm to continue evolving or altogether avoiding dissolution. Decision-makers within the firm can nonetheless utilize a firm's historical responses to previous crises to shape the future of the organization in anticipation of the next growth stage. In the instance of a newly formed firm, the young organization makes strategic and structural choices based on its circumstances that promote a phase of creative growth for the organization. As its successes demand increases in size and scope, the managerial attitudes that reigned during its infancy cannot be embodied in "who the organization has become". This leads to a leadership crisis between the ideals of the founder and the necessity to run the organization as a business rather than a small venture (Greiner, 1972). Firms that succeed in overcoming this hurdle shift gradually back into a stable period of growth before encountering another revolutionary moment in the guise of a management dilemma. Firms that do not overcome this barrier either choose to eschew the opportunity for further growth in favour of retaining their current form or they fail to integrate a solution to the dilemma which allows them to move forward, leading to their ultimate demise.

Similarly to how Greiner (1972) and Albert and Whetten (1985) explained the cycle through which management must make decisions about firm identity. Miles and Snow (1978) explored the model of the adaptive cycle of the firm. This adaptive process articulates three key cyclical problems in the firm's existence which require decisions pertaining to the strategy and subsequently the resources and structure that a firm will use to accomplish its goals. In new or existing firms that have come to resolve their previous engineering and administrative issues, the dilemma of the entrepreneurial problem forces decision-makers to delve into a concrete definition of the specific products or services the firm intends to create, and to whom it will cater. For Miles and Snow (1978) this represented the entrepreneurial problem of strategy; a researcher interested in organizational identity would simply rephrase the entrepreneurial problem as "who are we?". The engineering problem implies putting the articulated strategy formed in the entrepreneurial phase into systems and structures to realize this plan. The structure is formed as management determines how the firm will interact with its environment and will call for the coordination and control of internal operations (Miles & Snow, 1978). This control can be realized in many ways, of which history, culture, image or a shared sense of belonging can be articulated through organizational identity (Corley et al., 2006; Pfeffer, 1981). This control becomes the answer to "what is central and important to this firm?" as the articulated solution to the engineering problem. The administrative problem is the culmination of the other two problem/solution stages as leaders must now stabilize the processes which enabled the firm to propel forward through previous challenges, yet leave enough room for innovation and adaptation as the environment calls for re-evaluations of the products, markets, and technologies of a firm (Miles & Snow, 1978). This administrative problem can be seen as an extension of the decision-makers' reaction to shifting of their mono-identity organization towards a multiple identity hybrid (Whetten, 2006) and the management of these multiple identities (Pratt & Foreman, 2000). The cycle reconnects at the core questions of "Who are we?” and “Why are we here?” and thus continues in the cycle of adaptation between the organization and its environment.

The strategy literature has suggested that organizations in a given industry may manipulate their environment in order to make it more favourable for example by making it less uncertain and less regulated by direct interaction with the stakeholders concerned (Oliver, 1999). It becomes plausible as a natural extension of the organizational identity literature to propose that firms also posses multiple options through which to manage their multiple identities and manipulate the stakeholders in their environment (Albert & Adams, 2002; Pratt & Foreman, 2000). Tactics that organizations may use to successfully stabilize their environment all stem from leadership that consciously develops and articulates an internal image just as coherent as its external image. As Miles and Snow (1978) emphasized, decision-makers must demonstrate why and how an organization’s direction is reflective of its history, the current market, and the way the firm envisions itself to be in the future. They stressed the importance of strategy formulation, which although not directly stated also applies to the concept of organizational identity articulation.

Operationalization of Strategy and Organizational Identity Constructs

The body of literature combining strategy and organizational identity is limited yet burgeoning. Little has been documented to address the process by which strategy and organizational identity influence one another. Some empirical support exists for the impact of organizational identity on strategy-making (Kjærgaard, 2009). Several case studies have captured how identity shaped the firm’s strategic interpretation and response to its environment (Dutton & Dukerich, 1991; Gioia & Thomas, 1996; Glynn, 2000). Kjærgaard (2009) explored how the stable identity of a firm interacted and influenced the dynamic process of strategy development through a longitudinal qualitative study of a firm's implementation of a new strategy. The study gave evidence that identity can both promote and inhibit change within the organization, which can cause tension between decision-makers and members. Brunninge (2007) explored whether a firm was able to absorb change that was not in line with its identity. His case study suggested that certain labels, or professed identity, created a sense of stability through change, even if below the surface changes in identity did occur. He and Balmer (2007) also acknowledged the tactics of decision-makers when strategy and organizational identity dissonance was perceived, namely legitimizing and adjusting their perceptions of both concepts. Despite these advancements, few studies attempt to articulate *which* strategies and *which* organizational identity dimensions cause dissonance or positively influence change and at most these observations are presented as a single case study of the firm. Sillince (2006) combined the resource-based view of the firm with identity manipulation to demonstrate the potential of combining these two perspectives however he did not advance beyond generalizable propositions that may not apply in a particular industry setting. To this researcher's knowledge, no study has yet touched upon the question of pairing a particular kind of strategy with a particular kind of identity in a particular industry setting.

In order to operationalize the constructs, it must be acknowledged that various conceptualizations of organizational identity are used in various studies (Corley et al., 2006). The same holds true for strategy; the literature is rich in perspectives and paradigms. Due to the vastness of both concepts, and the researcher's desire for clarity into *which* organizational identities and strategies can or should be paired together, it is imperative that the constructs be framed by a particular taxonomy. For the purposes of this study strategy will be narrowed to the concept of strategic typology and organizational identity will be explored through the concept of organizational identity orientation, as both of these operationalizations have been validated in empirical studies (Brickson, 2005; Conant, Mokwa & Varadarajan, 1990) and provide accessible measures through which to study the strategy/identity dyad.

Strategic Typology

Each organization makes specific choices to address the problems it is facing, whether its choices stem from engineering, technological or administrative decisions which must be forced upon an organization. The choices, both strategy and identity-based, should provide limitless possibilities to a firm however most firms tend to congregate around a limited selection of choices, as some choices tend to naturally complement each other. From a strategic perspective, these combined complementary choices form organizational archetypes, particular characters, within a given industry. Miles and Snow (1978) outlined four such archetypes: Defenders, Prospectors, Analyzers and Reactors.

Defenders target a narrow market segment and do not seek opportunities outside their niche; consequently they rarely need to modify their structure, technology, or processes. Their main emphasis is on increasing efficiency in current functioning. They are routinely competitive on price or quality. Management however overlooks opportunities beyond their narrow scope of the market, and tend to view their external environment in a similar fashion. Growth is achieved by burrowing deeper in their present niche market, but even this will be slow and calculated. The strength of Defenders is their resilience to be dislodged from their prized position in industry. Their main liability stems from their potential inability to move should the market or consumer demand shift in any significant way.

Prospectors continually seek new opportunities beyond their niche, and experiment with new trends. They are the “creators of change”. Their one caveat is that at the expense of their fearlessness, flexibility and creativity they lose efficiency. Another potential source of problems is their risk of over-extending themselves into too many new market segments at any one time.

Analyzers are a combination of Defenders and Prospectors whereby they venture into changing or new market areas but also continue operations in more stable areas. They monitor their competitors and adopt what seems to be most promising. This is accomplished through imitation of the "sure bets" initiated by the Prospectors. They are followers of change and rarely creators of it. Their growth stems from both further market penetration and new market development.

Reactors are unfortunately "unhealthy"; although their decision-makers acknowledge change and uncertainty as operating within their environment, they are unable to effectively respond. Their experience may be a cycle of an inappropriate initial response, poor performance or negative reception from the external environment as a consequence thereby being hesitant to be proactive in the future. Rather than pre-emptively strike when change is eminent, they often wait until the environmental pressures force change upon them. Managers of this type of organization may have failed to articulate their strategy, may be holding on to a foregone strategy, or may possess a strategy that is inconsistent with their policies, structure, and technological capabilities. Miles and Snow (1978) suggested that this type is not a favourable and that effort must be exerted to transform into one of the other three more stable strategic typologies.

A strategic typology is a natural extension of organizational identity in that it contains the same beliefs which help guide appropriate behaviour for an organization (Fox-Wolfgramm et al., 1998). As such, a strategy typology may bind an organization to change behaviour consistent with that archetype, just as an organization’s identity may influence how it responds to change. To examine this proposition in further detail, Fox-Wolfgramm et al. (1998) conducted a case study of how two banks reacted to pressures to conform to new legislation. Enacted responses from both banks were typical with their articulated identities and corresponding typologies, namely as a Prospector and a Defender. The Prospector eventually embraced the change and was successful, whereas the Defender resisted more and failed to change its identity to be more compliant with the new legislation.

Organizational Identity Orientation

It has been suggested that organizational identity is formed in large part by how firms (i.e. their decision-makers and members, but for sake of brevity, firms) see themselves in relation to others. Identity orientation refers to the nature of assumed relations between organizations and its external environment including stakeholders, institutions and clients. The organizational identity orientation typology is comprised of three orientations: individualistic, relational and collectivistic (Brickson, 2005).

Firms with individualistic identity orientations seek to be recognized by traits and characteristics that distinguish them from others, much as individualism in the social psychology or cross-cultural management sense. Individualistic identity orientation firms are concerned solely with their own welfare.

Firms with relational identity orientations seek to be dyadically connected to specific partners through personalized bonds of attachment. The relational emphasis causes these firms to be primarily concerned with the well-being of their particular partners and maintaining these positive relationships.

Firms with collectivistic identity orientations seek membership and a sense of belonging to a larger group or groups than those with relational orientations, often at the community-wide level. Collectivistic identity orientation firms seek to maintain the welfare of the greater or larger group as a whole over the needs of the individual level firm.

The potential marrying between strategic typology and organizational identity orientation is plausible for many reasons. Both theoretical paradigms have been operationalized and validated through empirical studies (Brickson, 2005; Conant et al., 1990). In an extension of her earlier work, Brickson (2007) explored the way in which firm identity would interact with the environment such as external stakeholders as well as internal firm members. Her propositions suggested that organizational identity orientation serves to influence the social value creation of the firm. She theorized that firms possessing an individualistic organizational identity orientation are likely to be innovators, which is similar to the goals of Prospectors. Firms possessing relational orientations are proposed to have nurturing relationships and provide tailored care to meet particular needs of its primary customers, which is similar to the way Miles and Snow (1978) described Defender firms as niche protectors. Further, Brickson (2005) discovered that several firms in her sample were a combination or hybrid of different identity orientations; for those firms that possess a mix individualism and relational identities, it could be argued that they are exhibiting characteristics of Analyzer firms which share common elements with Propectors and Defenders. Lastly, Brickson’s sample included some firms who scored low on all identity orientation dimensions (2005); it is plausible that these firms are embodying the undesirable Reactor type, a strategic choice which is characterized with residual behaviours consistent will all three stable strategic types without consistently observing the conformities of one singular typology. These ties are merely suggestive as the exploratory study design did not allow for the formulation of testable hypotheses prior to data collection.

METHODOLOGY

This section will articulate how the frameworks chosen to represent strategy and identity, strategic typology and organizational identity orientation respectively, will be used to explore the research questions outlined in this study; what parallelism(s) should exist between a firm's strategy and identity? How will this impact performance?

The sample for this study was composed of 26 participants from 25 IT consulting firms[2] who were interviewed (refer to Appendix A for interview questions) and completed a brief questionnaire (refer to Appendix B for questionnaire). These participants responded to multiple measures and participated in multiple methods of data collection in order to provide a robust picture of their firm's own black box, the identity/strategy dyad.

Sample

The literature upon which this study is based provided valuable insights into the design of the study and in particular the identification of the population of interest. Previous empirical studies of strategy have focused on environment control, both temporally and geographically (DeSarbo, Di Benedetto, Song & Sinha, 2005) whereas study of organizational identity has concentrated on specific industries in order to better understand the comparisons between firms (Brickson, 2005). Conant et al. (1990) recognized that single-industry studies allow for a greater control over market peculiarities. The industry that this study would probe would

[2] Although only one participant per firm was recruited, one company insisted on having two members participate in the process, resulting in 26 interviews at 25 firms. In this instance, the two individuals were interviewed simultaneously although they did not provide separate answers in all instances. Their discussion ebbs and flows well between the participants and interviewer and are thus considered in the analysis as one respondent.

therefore need to be clearly marked in terms of boundaries, products and markets served yet provide enough intra-industry variability to make study of various strategic typologies and identity orientations plausible. Considering the time and resource restraints, the industry also had to be concentrated over a small geographic area to gain accessibility to the widest population possible from which to extract the data. Given these factors, the Information Technology (IT) consulting industry in Ottawa was chosen as the target population for this study.

IT consulting is part of the Information Technology and Communications (ITC) sector, which comprises 31,500 firms across Canada and employs more than 570,000 people (Industry Canada, 2009). The ITC sector generated in 2008 more than $155 billion in revenue and was a key driver to national growth with a 4.9% share of the GDP. Within the ITC sector, software and computer services make up nearly 80% of activities, of which nearly 94% specialize in computer systems design services (Industry Canada, 2009). Ottawa in particular is home to a large subset of the ITC sector as has been hailed the “Silicon Valley of the North”. As of 2009 there were 1,800 high technology companies within the Ottawa region employing more than 54,000 people (“Is Ottawa Still Silicon Valley North?”, 2009).

Within this high tech sector of the city, the IT consulting industry is fairly distinct. By IT consulting this study refers to any organization which provides consulting or other professional services related to IT for its clients, either through its own employees or through consultants that are “farmed out” to the client on a per diem rate. The IT consulting industry is primarily divided into two camps of service offerings: technology services that provide human resources, either through professional services or temporary staffing to perform the work and technology services that are based on product offerings. Firms range from small boutique shops to large system integrators offering a myriad of services. Within the industry, niches exist such as firms specializing in technology services that cater to a particular segment of the Government, such as security and defence. The IT consulting industry is fiercely competitive and sales-driven, with a marked emphasis on the volume of services rendered. Profits are often calculated based on gross margin, the service fee added to a consultant's wages that is paid for by the client for the duration of the contract.

The IT consulting industry in Ottawa serves a mixed base of clients including private sector as well as public sector, the largest client in the city arguably being the Government of Canada. IT consulting engagements in Government are typically executed through a formal procurement process. Demands for services are initiated by clients stating a requirement for a particular type of resource or product, for example a website developer or large-scale payroll system implementation. This Request for Proposal is broadcast to the entire industry, often open to any firm who possesses this type of consultant or skill. Firms must prepare a bid response in order to compete for the piece of business. The Government's procurement team evaluates the bids according to pre-established criteria and the firm awarded the greatest amount of points, usually based on price and technical skill evaluations, will be granted the contract to perform the service.

Brickson (2005) suggested organizations that serve a particular clientele will likely develop an identity orientation that is compatible with the values of its client base. Although the concept of catering to the public service would suggest a collectivistic orientation identity for firms in this city (Brickson, 2007), it is likely that a variety of identity orientations can co-exist in this market due to the fragmented nature of working with the public sector. Rather than a sole entity, the Government of Canada is segmented into departments, agencies, Crown corporations and other entities that govern their affairs somewhat independently, resulting in many smaller, niche-specific clients. The Government employs more than 160,000 people locally ("Ottawa public sector jobs set to drop: study", 2010). Thus the size of the industry, combined with the make-up variability of firms in terms of age, number of employees, clients served and products/services offered, created the opportune population for this study.

Participant Firms

Firms which elected to participate in this study (*N*=25) were represented by one senior member who completed both the questionnaire and interview. Participants' work function or title ranged from "CEO and President", "Founder", "Co-Owner" to "Managing Director", which was captured in the open interview question "What is your role in the firm?". The researcher went to great lengths to ensure that each participant was a senior member of the firm who could adequately articulate strategy, identity and performance concepts of the firm.

Firms were classified as working in one or more of three main areas of the IT consulting industry: professional services (i.e. technology consulting), staffing services and technology products, which could include tangible items such as hardware and services such as web-hosted platforms.

Table 1
IT Consulting Service Areas by Firm

Service Type	Sample
Professional Services	21
Staffing Services	9
Technology Products/Services	9

Note: Firms can offer more than one service type

Firm size ranged from small, local shops to large multinational corporations. Size was restricted to number of employees in the Ottawa business unit although the researcher made note of whether the firm was domestic or multinational.

Table 2
Size of Firm

Number of Employees	Sample
1-10	4
11-25	10
26-50	5
51-100	2
101+	4

The average age of the firm was 24 years (*SD* = 22.26) and the average tenure of the respondent was 12.08 years (*SD* = 7.81). It was not possible to verify if the sample was significantly different from non-participant firms in terms of size, number of employees or age however the variability within the sample is sufficient for the exploratory purposes of this study.

Measures – Performance

The organic perspective applied to strategy and identity allowed for a more holistic understanding of the firm and its interactions with the environment. In turn, the perspective can be used in the interpretation of the measure of performance for this study. The economic view of the firm assumes that profit-maximization is the primary motivation and raison d'être of all firms. Brickson (2007) on the contrary suggested that contemporary firms are faced with public pressure to accomplish more than shareholder wealth. Similarly, Jarvis et al. (2000) noted that small firms, in comparison with large enterprise, tend to articulate a range of goals beyond profit maximization, including survival and stability but often interspersed with “altruistic goals, status considerations and personal pride” (p.125). Jarvis et al. (2000) suggested that non-financial indicators of performance may provide a fuller picture of the firm, of particular interest as little is known about small business strategies. These measures may indicate what is valued in the firm as well as the behaviours through which these goals will be attained.

Jarvis et al. (2000) in a qualitative study of small firms used a grounded theory approach to interview owner-managers of small firms, asking “What is the most important thing to keep an eye on to assess how well the business is doing?”. Their findings suggested that owner-managers used a variety of metrics to assess how well their business was performing, including cash and cash flow. Owners discussed some non-financial performance measures, seen as more sensitive, accurate and appropriate than cash, for example the number of phone calls placed to the business in question. Almost all respondents used a complex mix of factors to monitor the business.

Borrowing from the Jarvis et al. (2000) approach to measuring performance, this researcher created three open-ended interview questions. The first enquired how well the business is doing, seeking to understand the organization’s preferred performance metrics. The second performance question follows up from the respondent’s earlier answer, asking how well the firm is performing given these metrics. Participants were then asked to identify any lags currently keeping the company from reaching its objectives. This qualitative approach moves beyond the assumption of economic outcomes as the central motivation for the firm, allowing a “softer” approach to measurement of the construct that is dictated by the firm. Organizations may have varying objectives, which may result in varying strategies and identities. These open-ended business performance measures will evaluate the extent to which the objectives have been achieved, whatever they may be (Jarvis et al., 2000).

To complement the qualitative side of performance, participants were asked to complete as part of the questionnaire a Likert-type scale which rated how well their firm had performed relative to other competitors in the market over the past year with a scale ranging from 0-10. This scale, based on a DeSarbo et al. (2005) adaptation of the Narver and Slater (1990) performance scale divides the possible performance of the firm into an 11 point distribution, each point representing the portion of competitors the firm has outperformed for a given year, for example "1" representing outperforming 1-10% of firms, or "8" representing outperforming 71-80% of firms. The scale contains economic metrics and was further modified to capture industry-specific metrics, such as consultant retention and gross margin which are highly scrutinized in the IT consulting industry. A participant's ratings of firm performance may be relatively subjective, although empirical evidence suggests objective and subjective measures of performance are highly correlated; objective measures are preferable, however it has been acknowledged that subjective measures can be used if valid data are unavailable (Dess & Robinson, 1984).

The participant focus on these performance measures, in particular the interview questions, benefited the study in two ways. First, it allowed firms to articulate what "really counts" for them (Brickson, 2007) as opposed to the researcher's a priori assumptions about good performance. An open dialogue also maintains the sense-giving view of identity (Ravasi & Schultz, 2006): "One's impression of how 'good' an entity is and how well it is achieving its aims depends on what one believes it and its aims are meant to be in the first place" (Brickson, 2007, p.868). Second, the IT consulting industry is comprised of a myriad of firms, some small, some large, some private and others public. Accessing performance data from privately-held firms is often difficult, as researchers interviewing a firm's "gate-keepers" (i.e. owners or senior managers) may lose their credibility if they seek to obtain sensitive and closely guarded performance data (Dess & Robinson, 1984). The performance measures in this study therefore offered a compromise that maintains face validity without alienating the participant base.

Measures – Strategic Typology

Conant et al. (1990) created a multi-item scale for operationalizing the Miles and Snow (1978) strategic typology. The questions were generated based on an in-depth analysis of the descriptions of the four archetypes which revealed eleven distinct strategic dimensions over the adaptive cycle which highlights distinct competencies for each type of firm. Distinct competencies between archetypes have been empirically supported (McDaniel & Kolari, 1987). Evidence of successfully deploying these competencies has been documented in three of the four archetypes that Miles and Snow (1978) proposed. Defenders, Prospectors and Analyzers, the stable archetypes, are theorized to be equally likely to perform well due to their ability to adapt to the changes in their environment. Reactors, due to their infrequent and uncertain strategy shifts, respond inappropriately to environmental change and uncertainty, thereby performing poorly. A number of empirical studies supported this performance gap between archetypes (Conant et al., 1990; DeSarbo et al., 2005)

The development of a multi-item multiple choice measure of strategic typology produced a more valid and reliable form of measure than previous methods of evaluating strategy. Prior approaches include self-typing by respondents based on a paragraph summary of the various archetypes. This tool over-simplified the archetype traits and used biased terminology when referring to Reactors (Conant et al., 1990). A particular feature of the Conant et al. measure was the wording of the Reactor profile; contrary to the negative labels (e.g. “unassertive” and “inconsistent”) generally used in the strategic typology literature, the Reactor profile answers were worded to create plausible strategic options that would not purposely deter or bias participants, such as “my company focuses on identifying the best possible solutions to those problems which require immediate attention” (1990, p.382).

The Conant et al. measure had a test-retest reliability coefficient of 0.69. The measure, in conjunction with a measure of firm marketing competencies and performance indicated that profitability was not significantly different among Defenders, Analyzers and Prospectors however each was significantly greater than the Reactor organizations (1990).

For this present study participants were asked to complete a modified version of the Conant et al. (1990) measure as part of the questionnaire (see Appendix B), one based on the wording used by DeSarbo et al. (2005) which focuses on generic statements that can be applied to any industry. Hambrick (1984) suggested typologies, due to their generic character, ignore industry and environmental peculiarities resulting in limited explanatory or predictive power. This study focused on one industry in a given geographical area with the intent to control for extraneous factors that may impact the explanatory abilities of the strategic typology.

Measures – Organizational Identity Orientation

On the individual level, identity has been used to explore how we see one’s self in comparison to others, which guides the interactions we have with others and the messages we communicate (Brickson, 2005). Extending the concept to the firm, Brickson (2005) proposed the use of the taxonomy of organizational identity orientation to explore firm relationships with stakeholders, both internal and external. If more can be understood of how the organization sees itself relating to others, it follows that we also gain a better appreciation of how the organization views itself, for example what can be implied of a firm that offers high wages and prestige in return for long hours versus a firm that provides employees with an accommodating professional environment that values loyalty. Understanding the organization's identity orientation is proposed to allow a greater understanding of the central interests of the firm and its motivations which in turn may help to understand its behaviours (Brickson, 2007).

Brickson (2005) classified previous empirical approaches to measuring organizational identity among three camps: the first involves articulating identity through the interpretation of policies, communication materials and other artefacts (e.g. Ravasi & Schultz, 2007), which provides an indirect measure focusing on the reflection of identity in these objects and outputs. The second involves the in-depth case study analysis (e.g. Glynn, 2000), a time intensive method which may bear few generalizations beyond the case organization. The third approach involves members rating their organization using scales that typify particular identity characteristics, which has the added benefit of producing quantitative data however it precludes the richness of qualitative data. The measures developed by Brickson (2005) attempted to bridge the gap between these approaches. The methodology used in the present study also attempts to tie a quantitative aspect to the qualitatively-dense concepts of identity and strategy.

Identity orientation when applied to individuals has motivational implications; individualistic-oriented individuals are concerned with their own welfare, whereas relational-oriented individuals are concerned by the well-being of particular others and on maintaining these relationships, and collectivistic-oriented individuals are preoccupied with a broader concern for the welfare of the greater group as a whole. This three part typology has been empirically supported (Kashima & Hardie, 2000).

The measures adapted and developed for the organizational identity orientation framework were validated on more than 1,100 participants from more than 80 firms in two distinct industries, a professional services industry and a manufacturing-based industry. No statistical differences in firm size, age, region or product/service type existed between participants and non-participants of the sample (Brickson, 2005). Assuming that identity orientation would vary given the organization's function and client types, similar to the division of utilitarian versus normative identities, Brickson expected to find primarily individualistic orientation identities among for-profit firms however results suggested all orientation identities are possible to varying degrees within an industry. Her results also indicated that although organizational identity orientation is presented as taxonomy, the orientation types are not mutually exclusive (2005).

The measures Brickson (2005) used are not replicated in full in this study therefore only those of interest to the research questions on hand are discussed. Participants were asked to complete a three-item measure in the questionnaire which Brickson (2005) derived from Kashima and Hardie's (2000) Relational, Individual, Collective Self-Aspects Scale. Brickson's measures sought to discern the participant organization's identity orientation through items probing into what is central, enduring and distinctive (Albert & Whetten, 1985) about the firm. Following their completion of the questionnaire, participants were asked to articulate in further detail why they selected their particular answers to these three items. The open-ended question was an adaptation of Brickson's (2005) approach which relied on written responses to that same question. This approach maintained harmony with the other identity-based qualitative measures which relied solely on oral communication between the researcher and participant.

The interview with each participant also included three identity-focused questions. The first question asked the individual to describe their organization as if it were a person; this question was chosen as Brickson stated "on the principle that members tend to anthropomorphize organizations" (2005, p.586). The second question asked participants what they believed was the most accurate motto of their organization, this item based on Albert and Whetten's (1985) classic question of "Who we are". The third question, the troubling event scenario, was originally derived from Gabriel and Gardner (1999). Brickson (2005) articulated that identity is at the core of the organization therefore any issues which threaten it would be particularly troubling, whether real or imagined.

Data – Collection

A non-participant who had intimate knowledge of the industry generated a short list of 34 possible target firms from which to begin the participant recruitment process, out of the more than 300 firms in the area[3]. IT consulting firms who had been in business for more than 12 consecutive months with 2 or more employees were targeted[4]. From this original list of leads I used a snowball sampling technique which generated a list of 45 of firms that were approached, of which 25 agreed to participate, resulting in a 55% participation rate.

Bearing in mind that the key concepts of the study can be considered intimate organizational knowledge, firms were guaranteed confidentiality. The decision was made to forego financial analysis of the firm early on in the study design to increase legitimacy of the

[3] It is difficult to assess the exact number of IT consulting firms as there is no main list or directory service however several sources in my data collection cited this number therefore I accept it as a rough estimate.

[4] Firms had to have been in business more than 12 months in order to respond to the performance measures which were based on recalling performance in the last year. Sole proprietorships were excluded from the search criteria as their lack of employees (members) may limit their ability to articulate their strategy to others, and the identity concepts from a sense-giving perspective may be underdeveloped.

study and appeal to potential participants (Dess & Robinson, 1984). One participant per firm was recruited[3], which is acknowledged to be less preferable than multiple respondents when measuring organizational-level constructs (Conant et al., 1990). To mitigate this concern the recruitment focused solely on senior executives or owners of the firm. In interviewing the firm's leader or top management team member, it is assumed that this individual can influence the firm with his or her own values, beliefs and behaviour. Leaders also possess influence on both strategy and organizational identity formulation and adaptation over time (Albert & Whetten, 1985; Child, 1972; Fox-Wolfgramm et al., 1998).

Individual participants met with the researcher for approximately one hour. The first part of the session involved the interview questions (refer to Appendix A) which were paused once the troubling event question had been completed in order for the participant to complete the questionnaire (refer to Appendix B). Once the paper and pencil measures were completed the interview was resumed to gain clarity on the three-item identity orientation measure. Interviews were recorded and transcribed for data coding and analysis.

Data - Coding

The questionnaire includes 10 open-ended questions which produced 250 qualitative responses to analyze. The researcher read the responses several times, one question and one firm at a time in order to get a sense of the statements and themes that emerged. Coding schemes for individualistic, relational and collectivistic identity orientations were developed a priori based on the recurrent items from Brickson's (2005; 2007) work as well as Kashima and Hardie (2000). Coding schemes for the four strategic typologies were defined based on the definitions provided by Miles and Snow (1978) and a similar approach was used to define the coding scheme for performance using the various metrics cited in Jarvis et al. (2000). Codes could be a single word or phrase which reflected the theory in which the concept was grounded. Elements which could not be placed into one of the 8 coding schemes were not coded, as per Brickson's (2005) coding technique. The process produced 8 separate coding schemes for the key qualitative constructs.

From these initial code schemes the list of codes was expanded as the responses were reviewed several more times. Similarly to Brickson (2005), the researcher consulted a dictionary and thesaurus, and sought to distinguish nuances in meaning and expanded coding schemes as new themes emerged. Following suggestions of Miles and Huberman (1994), coding schemes were drawn out onto large poster boards and notes were added to schemes with possible linkages to other statements. The researcher coded and recoded searching for common phrases and sentiments that complemented the overall flow of the other interviews. After editing the code schemes several times, a second coder reviewed the data to interpret the schemes. After discussions to resolve discrepancies and changes to the coding schemes each rater evaluated the data resulting in a 0.92 inter-rater reliability[5]. Table 3 provides examples of the baseline coding schemes for the 8 constructs, examples of the evolution of the coding scheme as well as excerpts from the transcripts to illustrate these coding schemes.

[5] For this study inter-rater reliability was calculated by comparing the number of qualitative statements (out of 250) correctly coded versus the total number of qualitative statements.

Table 3
Examples of the Evolution of Coding Schemes

Construct	Literature-Based Code	Evolution of Code	Illustrative Quote
Individualistic Identity Orientation	“aggressive”; “ambitious”; “profit-oriented”	From “aggressive” to “resilient”, “adaptable”, “handling rejection”	“to be successful in this you have to be very resilient, you have to constantly pick yourself up, dust yourself off and go back in it again and take another beating”
Relational Identity Orientation	“caring”; “accommodating”; “trustworthy”	From “trustworthy” to “ethical”; “honest”; “reliable”; “professional”	“We still get raves from our customers for doing the right thing, and I believe we would do the right thing every time”
Collectivistic Identity Orientation	“community-oriented”; “promoting a cause”; “politically active”	From “politically active” to “concerned about the impacts of politics on the industry”	“some of our colleagues are totally dependent on Government ,when that spigot gets turned off, due to political will, that’s very troubling”
Prospector Strategy	“innovators”; “searching for new opportunities”	From “innovator” to “ambitious”, “creative”, “hoping to succeed”	“So we’re changing, I think we’re keeping pace with the times and I think we’re still seen as a leader in the field”
Analyzer Strategy	“new domain accomplished through imitation”; “stability and flexibility”	From “stable but changing domains” to “adopting best practices”	“(From trends we already have) products are going to play a role in our future strategy, they’re already playing a role in our current strategy, but we’re kind of looking at a space that’s underserviced”
Defender Strategy	“narrow domain”; “improving efficiency”	From “narrow domain” to “resisting an attack”, “protecting”	“The organization is unique is based on its set of experiences that is very narrow and very deep and that’s pretty unique”
Reactor Strategy	“inconsistent and inappropriate response”; “reluctant to act”	From a lack of clear response to “fighting fires”	“(can’t plan) you never know what the day is going to bring to you”
Performance	“cash”; “profit”; “growth”	From financial-based metrics to those based on people: “hot talent”; “resource availability”; “actions of staff”	“you need to attempt to make 20 calls, from that you should get 2 meetings, and from 2 meetings you should get 1 job order, and from 4 job orders you should get 1 close”

Data – Analysis

In consideration of the mix of quantitative and qualitative measures the analysis of each theoretical construct is discussed separately however the coding methodology described above was applied to all qualitative responses.

For organizational identity orientation, interview responses to each question pertaining to identity were analyzed by calculating a percentage score for the number of codes corresponding to a given scheme (relational, individualistic or collectivistic) divided by the total number of codes for all possible identity orientation statements for that response. For example the motto question could have produced for a participant a total of seven codes, three relational and four individualistic which would result in a percentage score of 42.86% for relational and 57.14% for individualistic. These “scores” for each interview question were combined with the “score” from the three-item scale (a 100% per identity orientation chosen per question) and tabulated with equal weight to create a final make-up of the firm’s identity orientation (e.g. 5% collectivistic, 20% relational, 75% individualistic). The firms were then labeled one identity orientation according to the orientation which had resulted in the highest score using both qualitative and quantitative measures.

For the multi-scale measure of strategic typology the nominal data it produced was measured by “majority-rule” (Conant et al, 1990). Each multiple choice item has a corresponding Defender, Analyzer, Prospector or Reactor response. Answers per archetype were tabulated and turned into percentage score for the firm’s strategic typology make-up (e.g. 60% Prospector, 20% Analyzer, 20% Defender and 0% Reactor). In the instance of a tie between Defender, Prospector and/or Analyzers, the respondent would be classified as an Analyzer, which subsumes characteristics of both other archetypes (Miles & Snow, 1985). If the tie occurred between any of the three stable archetypes and Reactor, the respondent was classified as a Reactor (Conant et al., 1990). Interview transcripts were also analyzed using the coding schemes for the four strategic typologies however its analysis was not restricted to a particular question, as evidence of strategy may be fluid and would best be captured by the overall description or summary of the firm (Fox-Wolfgramm et al., 1998). Using a similar approach to that used for identity orientation the interviews were given percentage scores based on the frequency of the respective Prospector, Analyzer, Defender and Reactor terms found throughout the interview transcript. The qualitative score was then added to the quantitative score to produce an average score for each firm for the four typologies. The firms were then labeled one strategic typology according to the type which had resulted in the highest score using both qualitative and quantitative measures.

The resulting labels for each firm, one identity orientation and one strategic typology respectively, were used to assemble firms into categories to further examine through a qualitative lens for trends and additional nuances. Performance qualitative data from the three performance-targeted interview questions were examined in conjunction with the categories of firms to discern if different types of firms (e.g. Individualistic Defender) would have distinct metrics and performance lags.

RESULTS

The two research questions this exploratory study attempts to flesh out, a search for parallelism(s) between strategy and identity and whether this could impact performance, are addressed together in this section.

Qualitative Data

Firms were categorized according to their dominant strategic typology and identity orientation. All four strategic typologies were represented in the sample; Prospectors (*n*=7), Analyzers (*n*=6), Defenders (*n*=8) and Reactors (*n*=4). All three organizational identity orientations were also represented; Individualistic (*n*=11), Relational (*n*=12) and Collectivistic (*n*=2). Firms are examined for qualitative analysis through their profile of combined strategy and identity types as illustrated in Table 4.

Table 4
Profile of Firms

	Prospector	Analyzer	Defender	Reactor
Individualistic	4	3	2	2
Relational	2	3	6	1
Collectivistic	1	-	-	1

Coding schemes were applied to transcripts before the analysis of questionnaire data was conducted to ensure that the trends being identified were free of bias. Firms were first labeled according to the strategic typology and identity orientation that seemed most evident given the statements observed, and was revised in some instances following the scores of the quantitative measures, as discussed in the Quantitative Data analysis section. There were no pure types in the sample, which would result from having only one typology and one identity orientation throughout the questionnaire and transcript. Firms are grouped together for this discussion according to their profile which takes into consideration the highest combined score for both qualitative and quantitative methods of measuring strategic typology and organizational identity orientation.

Individualistic Prospectors

Miles and Snow (1978) conceptualized Prospectors as innovators who would vigorously pursue expansion of their domains. As creators of change, they have the capacity to monitor a wide-range of environmental conditions and regularly experiment with new products or services. Their biggest fault is their tendency to overextend by broadening their reach too far, too often and too soon. The misutilization of resources is a constant concern for Prospectors, resulting in complex and expensive forms of coordination to compensate for its fluid processes, job functions and structure.

Prospectors are characterized by their heavy emphasis on research and development. To be innovative they must possess stores of creativity and be willing to deploy it. In short, they take risks on the hopes that they will be successful. Closely tied to the theme of innovation is ambition; Prospectors by their nature are fluid and continuously seeking new opportunities. Fittingly, the Prospectors in this sample all serve public sector clients as well as another sector such as the financial industry. Although some of Defenders, Analyzers and Reactors in this study serve more than one domain, not one of the other typologies is as consistent in this behaviour as are Prospectors.

The sheer complexity and variety of ideas and projects that creativity and ambition entail create environmental conditions in which conflicts or disagreements between teams can occur (Miles & Snow, 1978). One Prospector described his company as Medusa, alluding to the multiple heads of different business lines: "*these different heads have to go and chase that within their domains, and is there going to be conflict sometimes? Um yeah. And that's the challenge of the body to manage that*".

Although Miles and Snow (1978) did not delve too deeply into how employees are managed, they did acknowledge that the top management team is aware of administrative adjustments necessary to accomplish the emerging strategy. In terms of management efforts, it would seem that Prospectors need employees who will be willing to accept change at a moment's notice, contribute hard work to achieve lofty objectives, and positively respond to a creative push. These demands on employees may be incompatible with softer, nurturing, partnership-based relationships characterized by Relational or Collectivistic identity orientations. Individualistic firms will have relationships with employees based on instrumentality to maximize the firm's benefit (Brickson, 2005). Individualistic identity is conceived as all traits that distinguish the firm from other organizations, focusing on its differentiators and uniqueness. Oriented towards the self, these organizations possess qualities such as "ambitious", "profit-oriented", "strives for the best", "desire to stay on top" (Brickson, 2005). The overlapping features of Prospectors and Innovators are exemplified in the quotes of Table 5. These ties between Prospectors and Individualistic traits are consistent with literature suggesting firms emphasizing individualism may instill individual initiative and ambition in its members, who may be more willing to take bold steps when faced with risk (Brickson, 2007).

Three of the Individualistic Prospectors used performance metrics which echo individualistic traits, such as concern for bottom line profitability and firm visibility, the latter of which echoes the individualistic tendency to differentiate from others. Two of the firms identified current struggles with finances but attributed it to a short-term situation for long-term gain, such as the development of new software which required the allocation of most financial resources to the R&D side of the business, a reality consistent with the Prospector strategy.

Furthering the concept of relationships based on instrumentality, when discussing their current performance and lags in the business, all four Individualistic Prospectors lamented their struggles to find people who would fit their criteria (e.g. "*We have no junior people, all the people we use have experience or advanced degrees*"; "*that's what's holding us back. Because if you hire B level players, you'll always stay a B level company. If you can hire A level players you'll obviously be an A level firm*"), or finding talented resources who would fit into their culture of excellence and ambition. Despite the "mythical manhunt" as one participant described this lag, the Individualistic Prospectors described their businesses as performing very well.

Table 5
Parallelisms between Prospector strategy and Individualistic identity orientation

Individualistic Identity	Parallelisms	Prospector Strategy
(If your company were a person?) "The company is [...]technically extremely strong, big dreams, quite innovative in the way we do things"	**Innovation**	"[...] we're in the process of releasing brand new software right now which we call XYZ, and strategically it's meant to be something quite different from what we and most of our competition have been doing in the past"
"I would say aggressive. And growth oriented would probably [...] describe our business if they were a person"	**Ambition**	"[...] we have a view of being the largest in Canada and entering other national markets which we're in the process of and that is a core driving piece of our strategy"
(troubling event?) "Well we just downsized the professional services emphasis (when we lost a major client) [...] the more people we carried the less opportunity there would be to respond to the business environment changing"	**Relationships are instrumental**	"[...] not able to successfully integrate new engineering talent into our engineering team, several reasons one is the cultural component we have a very hard driving culture that although relatively laid back on the surface is very, very driven and pragmatic and requires great flexibility on the part of the people who join the team"

Note: Quotes being compared for each parallelism are taken from the same participant's transcript

Other Prospectors

Two Prospectors were identified as possessing Relational identity orientations. Both identified a strong concern for selecting the right business partner, one even countering that they would turn away from business dealings with clients who did not share their beliefs.

The performance metrics used by these firms were a mix of profit-based financial metrics and service-oriented project-based metrics such as project budget, scope and timely delivery. Their performance lags alluded to difficulties coordinating their employees, which is consistent with the Prospector's multiple projects and ambitious goals. As these firms were examined in greater detail, it became apparent that these were two of the four largest firms in the sample, which were large multinationals. Upon closer review of the rest of the sample, three of the four largest firms (more than 101 employees in the local area) were Relational, the fourth exhibiting some Relational characteristics but predominantly Individualistic. It is plausible that a Relational identity is an inherent need for very large organizations that require a unifying factor, a strong tie to its employees, to help manage the complex coordination of large-scale, ambitious and creative operations that carry the Prospector strategy forward:

> "*When you go from 100,000 or 110,000 employees to over 300,000 […] your biggest problem, if there's a lag, is just the absorption of those employees into one organization […] I think what we're seeing here is some path finding that's going on in the space of almost the human engineering side, that says how do you absorb all these people, how do they feel like they're all one organization*".

Both firms felt they were performing very well. It is interesting to note that for these two firms their troubling event hypothetical scenario shared the fear of a mark against their reputation, a concept that is traditionally associated with Individualistic firms (Brickson, 2005). As both are large publicly-traded companies with strong visibility in the marketplace, it is also plausible that this troubling event scenario remains at the forefront of concern despite their relational orientation.

One firm possessed the counter-intuitive combination of a Collectivistic Prospector that was quite small in size (i.e. 11-25 employees) yet seemed to be performing on equal footing with its Individualistic counterparts. Their business was based on the motto "passion is core to success": "*we've ended up focusing (on this technology) because we're passionate about helping people […] it's real deep inside, not just to make money, we feel very deeply connected that we're helping people with our business and that we're helping ourselves grow at the same time*".

Trailblazing in a new web-based service line, this firm's performance metrics were more client- and mentor-based than their collectivistic label would suggest, focusing on client retention, degree of impact to client's business and benchmarking against their mentors who are also heavily involved in their community's charitable activities. Despite these inconsistent metrics, the firm defines success in collectivistic terms: *"[…] a company can be extremely successful if they are one of the most important things if not the most important thing is that they recognize the community they live in and they contribute to it*". The firm's President felt they had become successful enough in business to impact the community positively while being an exemplar for other firms. This observation lends support to Brickson's comment that Relational or Collectivistic identities in for-profit firms are not incompatible with individual needs and outcomes such as financial success and growth: “they need not be self-sacrificial. They too possess the need and drive to survive” (2007, p.868).

Relational Defenders

Defenders as the name suggest are niche protectors who will aggressively maintain their prominence in their chosen market segment at almost any cost, whether by cutting prices or by burrowing deeper into their existing market through excellent customer service (Miles & Snow, 1978). Extremely efficient, Defenders tend to grow cautiously and incrementally, preferring to be “lean and hungry”. Their heavy reliance on a single service or technology can also represent their downfall as they can quickly become extinct should market demand shift significantly away from their products. Four of the six Relational Defenders described their organizations as lean, such as the firm owner who wore multiple hats to juggle different responsibilities such as service delivery, recruitment, and payroll. A participant emphasized efficiency by putting the sales accountability on service delivery-based personnel instead of a dedicated sales force. Another made deliberate choices not to establish infrastructure downtown such as an office, and ran the business out of his home basement.

Having entrenched themselves into a particular niche, their survival hinges on their ability to maintain relevancy with clients by creating deep and formal ties. This emphasis of enhancing the welfare of these others is consistent with Brickson’s operationalization of Relational identity (2005). This dependency on others creates natural compatibility between the need to protect and defend those relationships in order to survive and the emphasis placed on relationships due to their importance over the needs of the individual self: “*Why does my organization exist? My organization does not exist for me or for my employees, it doesn’t exist for the tax man, it exists for the clients and if we don’t have clients we should go home*”. This desire to place client needs above all others are embodied in standards of client service excellence (Brickson, 2007). Two firms boasted of absorbing business losses to pass the profits along to clients or consultants because "*it's the right thing to do*". Bricskon (2005) envisioned Relational identity as fostering mutually satisfactory relationships and in some way Relational Defenders gain satisfaction by over-emphasizing the principles of client satisfaction, even if their motivations to do so are less tangible to outsiders.

Relational Defenders seem to be so entrenched in their own affairs and relationships that the "right thing to do" may not only be a value of the firm but be projected onto others with whom the firm interacts. Three of the six Relational Defenders seem to idolize loyalty as a principle which should be upheld by the firm and by the partners with whom it interacts. These three firms would distance themselves away from anything that was unprofessional, unethical or questionable however their partners may not have always done the same, as was the case for one firm whose client betrayed their trust. The overlapping features of Defenders and Relational identity are exemplified in the quotes of Table 6.

Brickson (2007) had proposed that Relational firms would create nurturing relationships with their employees however for these Defenders this was not the case, perhaps in part attributable to the over-emphasis on clients and the Defender need to remain lean and efficient by keeping costs on training and wages low (Miles & Snow, 1978). This is not to say that Defenders mistreated their employees; they are simply lower on the hierarchical list of priorities. The Relational firms may not be able to provide for their employees' need for belongingness and dyadic concern (Brickson, 2007) but these firms do perhaps provide their employees with the resilience required to keep the Defender successful, and as evidenced by their assessment of their ability to retain employees, they seem to be doing so quite well.

Four of the Relational Defenders possessed performance metrics based on individualistic themes such as profitability. One firm prized above all else relationship-based metrics such as stability of relationship with their client, which is most consistent with the Relational identity. The performance lags that three of the firms experienced were consistent with Defender behaviour; one participant discussed not making enough money to cover his employees' billable hours, a concern for any lean and hungry organization. Another participant discussed the need to formalize certain functions to make themselves more efficient and the third firm lamented that the shift in the Government of Canada's procurement may be too great a change for this niche protector to absorb: "*One of my preoccupations when we talk about the going ahead strategy[…], how you work outside of that (environment in which things are being awarded to who can tell the greatest lie), as we don't fit particularly well […]right now*".

Table 6
Parallelisms between Defender strategy and Relational identity orientation

Relational Identity	Parallelisms	Defender Strategy
"Motto, we're a high touch high service organization which means we operate a three-wide, three-deep organization, every client relationship has three people that they can talk to"	**Strong service climate**	"We're not all things to all people, we're in a niche that's typically played in by (bigger companies), and 7/10 times, we beat them, we have to ensure we're providing more value [...] sometimes we have to sacrifice those margins initially in order to build those relationships (with clients)"
(troubling event?) "[...] we have a pretty unique relationship with the organizations that we work with in that I really believe that we are really trusted, and part of that puts a big responsibility on me to make sure that there are things happening in the background that mean that there are no problems (that would trouble the client relationship)"	**Client relationships are sacred**	"We don't make any grand plans, we fit into our clients' plans.[...] Our decision-making is always trying to make the decision that is right for the customer, not right for ourselves"
(troubling event?)"(Our own client poached our full-time employee), [...]it's a huge disruption for the equilibrium [...] good business is based on trust, and discussion and openness and transparency and when people start to do that you really lose a lot of the harmony between partners"	**Loyalty above all other values**	"Here we don't do sub-contracting, we have full-time employees and the reason that we have this business model is so that we could provide long-term solutions to our clients, so the things we build ten years ago we still maintain so the relationships we have with our clients is generally long-term"

Note: Quotes being compared for each parellelism are taken from the same participant's transcript

Other Defenders

Two other firms were identified as Defenders, both displaying Individualistic identity orientations. Although both displayed some of the tendencies of Relational Defenders, they articulated more concerns that were oriented towards the self rather than others, such as impacts to their profitability and reputation. Their metrics were a mix of financial-driven individualistic concerns, and some metrics relying on relational concerns such as loyalty and care for employees. Their other metrics were based on intensive planning, which is consistent with Defender behaviour.

The most striking difference between this group of Defenders and the Relational group was the former's view of client relationships: this group viewed clients as a stepping stone to other, new clients versus Relationals, for whom relationships are not a means to an end but largely an end to themselves (Brickson, 2007). It was not clear from reading their transcripts what other factors may have contributed to their attitudinal divergence from the Relational Defender group. One of the Individualistic Defenders highlighted the importance of caring for its employees among its metrics, which is inconsistent with its other behaviours. This participant remarked his firm was "moderately successful", similar to the ratings given by the other firm in this group. Both firms felt that their primary performance lag was the need to be more efficient and formalized in their processes and planning, a decidedly Defender-like trait.

Relational and Individualistic Analyzers

Analyzers share traits from both Prospectors and Defenders, able to operate in stable and changing market domains, planning intensively and comprehensively and possessing a moderate degree of efficiency. Analyzers however are not strictly half-Prospectors and half-Defenders; they minimize risk like the latter and maximize opportunities for profits like the former but they accomplish this growth solely through imitation once the new opportunity's viability has been demonstrated by others. Their strength is their ability to adapt and balance between the two other strategic typologies however the capacity to balance has a price; the need to be both stable and flexible limits the Analyzers' ability to move dramatically should the market shift significantly (Miles & Snow, 1978).

As Analyzers share traits with Prospectors and Defenders, it would seem a natural fit that Analyzers could balance between Individualistic and Relational identities. Although Brickson (2005) discussed variability between pure types and hybrid types of organizational identity orientation there was in this sample no case of a firm split evenly between the two identities. Of the six Analyzers in the sample, three were predominantly Relational, focused on strong relationships with their clients, and three were predominantly Individualistic, emphasizing their distinctiveness from others. It was surprising to find that those Analyzers whose tendencies fell towards Prospector behaviours did not necessarily associate themselves with Individualistic identity, the same effect which was repeated with Defender-like behaviours and Relational identity. This cross-interaction hindered the search for parallelisms between specific strategies and typologies, although blame cannot be placed on the interactions themselves; it is plausible that parallelisms as a paradigm is not capable of capturing all types of identity/strategy relationships, such as this balance mechanism.

The emerging theme for Analyzers, Relational and Individualistic, was their ability to adapt and balance between some or all of the four possible profiles. Quotes illustrating various firms' ability to balance between the two identities and the two strategies (respectively) are exemplified in Table 7. The first row exemplifies the Analyzer's ability to balance its need to promote its own interests (e.g. image) with those of its dyadic other, the firm's clients. The second row illustrates the Analyzer's ability to balance its need for stable niche protection against its desire to explore new markets or service areas for growth opportunities.

Other striking commonalities between the Relational and Individualistic Analyzers were their common focus on individualistic-based metrics such as profit, gross margin revenue and image within the industry and similar performance lags. Three of the six Analyzers, both

Relational (*n* = 1) and Individualistic (*n* =2) identified their area of improvement as related to training or improving their staff's knowledge however this goal was not articulated with the employees' interests in mind; the participants' rationale always included some other, individualistic end goal, which is consistent with an Individualistic or Prospector firm's instrumental relationship to staff: "*So the onus is on us to train them and we can do it but if we had the resources or if people came more equipped to do the job I think companies like us would really benefit*"; "[…]*to pay for people for 6 months and they haven't delivered but I know the end goal is right because it takes a good 6 months to a year (for a good sales rep) to pay for themselves*". These firms exhibit a tendency towards individualistic metrics and performance lags however the group overall conveyed elements representative of relational or Analyzer performance metrics. In general, the juggling of multiple identities and strategies, this balancing act, appears to work well for this group of Analyzers as they seemed at time of interview to be more confident in stating that their firm performed well, more so than some of the other participants in the study.

Table 7
Equilibrium Between Strategies of Analyzers and Identities of Analyzers

Balancing Identities: Relational and Individualistic Orientations.		"(Motto?) One of them is to make our clients look like heroes in their organization […] (what's the organization most concerned about?)[...] it's important to build those trust relationships with those clients, if you don't have that, you won't get repeat business or reference business" "(What's most important to the organization?) Good business ethics, what's good for people, what's good for clients, good for image"
Balancing Strategies: Defender and Prospector Typologies.	**Emphasis on Balance**	"[…] being Ottawa based, right now 75% of our revenue comes from Ottawa, we're trying to diverse away, about $3^{1/2}$ years ago we opened our first branch office in Toronto and that's been great, in a short period of time we've already diversified about 30% of our business away and we opened (an office in) Montreal this summer so that's another step towards expanding across Canada but also diversifying away from government so we don't have all our eggs in one basket" "[...] so we're in the process of just trying to flush out our value added practices (away from service lines that are dated towards what's the newer trends) and the underlying capability in our organization is still IT staffing"

Note: Traits being compared within the same quote are taken from the same participant's transcript

Reactors: Individualistic, Relational and Collectivistic

Firms that are not characterized as Defenders, Prospectors or Analyzers are by default Reactors. These unstable firms are characterized by a strategy that does not "stick", sporadic monitoring of the environment, and continuously changing structure in order to meet short-term needs. Management teams of Reactors detect change and uncertainty in their environment yet are unable to effectively respond, resulting in an endless cycle of poor responses to this change, performing badly as a result and being hesitant to act assertively in the future (Miles & Snow, 1978).

Upon initial glance at this strategic type the researcher assumed that identity orientation statements would be difficult to tease out, or would be scattered and equally divided among the three orientations. The sample's four Reactors are in fact strongly identified as either Collectivistic (n = 1), Relational (n = 1), or Individualistic (n = 2).

The Collectivistic Reactor held strong ties to both the geographic community and the IT consulting community as whole, often lobbying on the latter's behalf. On the surface, the firm claimed to be performing well, having increased profits by several million over the previous year. Its principal performance lags were consistent with its Collectivistic Reactor profile; the firm spent too much time monitoring and reacting to the external environment's every change and the firm was preoccupied by threats to the industry. Despite its seamless surface, the firm offered confusing descriptions of its central and enduring qualities, such as the philosophy of "*Dream like you're going to die tomorrow*" and did not possess performance metrics aligned with its collectivistic identity; rather, the firm's metrics centered on costs, profits, qualified employees and the number of deployed resources.

The Relational Reactor firm was struggling with its inability to focus on a long-term strategy. Their "cowboy" attitude had kept them afloat until now and did not appear to be a source of concern, although proper resource allocation had become an identified problem which they felt they should redress. The metrics of this firm were consistent with its identity, highlighting key factors such as quality of service and client satisfaction. The performance lags mentioned by the participant were consistent with the poor choice of strategy, or lack thereof, which had perhaps caused the firm to become a Reactor: "*(lags?) One I would think that focus,* *meaning that we sometimes get boggled down in the work and no one is really having the vision or focus to answer growth*". This participant rated his firm as performing at 75% of its potential yet indicated they were satisfied with the status quo.

Of the two Individualistic Reactors, one of them was the fourth of the four largest companies in the sample, another large multinational. The participant admitted the organization was heavily siloed, unmanageably so and had changed too much to remain sustainable: "*we're so busy putting out fires […] that we cannot maintain […]in the current fashion that we're living […]. You wake up […] and wonder if this is the day that the sector you belong to is going to be sold*". Although the firm's top management knew "*they didn't want to lose their good people*", they could not presently emulate a Relational identity, which could have been crucial to the ongoing success of such a large firm. The large multinational, consistent with the other largest firms in the sample, relied more heavily on financial metrics, which would be consistent with measures associated with publicly-traded companies (Jarvis et al., 2000).

Lastly, the other Individualistic Reactor struggled to cope with change in their environment, in this case changes to the procurement strategy by the Government of Canada. This problem was recognized by other firms but addressed through their more appropriate strategic responses, such as the Defender digging into their specialized niche in order to survive Government cuts to spending as this Relational Defender states: "*we're in a niche that is all about doing more with less, IT service management, one of the four cornerstones that the Government of Canada is looking at going forward to save money so there's a lot of opportunity for us*". While this firm's metrics were solely margin-based, the performance lags the CEO identified were not consistent with its identity or its acknowledged struggles in industry; this firm may be an example of a firm who is unable to articulate a proper strategic response to environmental shifts: "*[…]but what is that breaking point? How low of a margin (are you willing to go)?[…] It's very, very challenging right now*".

Quantitative Data

Questionnaire data were imputed into SPSS. Missing data, all related to performance metrics, were treated with an imputation method of median score for that participant's other performance metrics. This method generates results comparable to other acceptable imputation methods (Jönsson & Wohlin, 2006) and allowed all 25 cases to be included in the statistical analysis.

Data from each measure, including interview score percentages and questionnaire score percentages of strategic typologies and identity orientations, were plotted on a histogram to verify their distribution. The overall classification of strategic typologies variable was approximately normal whereas organizational identity orientation classification was slightly skewed due to the greater representation of Individualistic and Relational identities within the sample. All other variables appeared to be either approximately normal or slightly skewed to the left or to the right therefore the results of parametric statistics herein should be approached with caution.

Borrowing from Fiske and Campbell (1992), the constructs of identity and strategy were analyzed using both the questionnaire and interview. In the construction of the complete profile for each firm, this method allowed the researcher to correct in some cases the assignment of a firm's strategic typology. Three firms were identified as one identity or strategy type via questionnaire however the interview was not consistent with that behaviour and reflected the dominance of another typology, often one whose questionnaire percentage score was second highest when ranking the typology scores for that firm.

The percentage score profiles of each trait, the four typologies and three orientations, were used in statistical analysis in order to seek out relationships between the constructs. An adapted Multitrait-Multimethod Matrix approach to data analysis was used in order to discern convergence between the measured type of strategy and identity (Fiske & Campbell, 1992).

The multimethod approach permitted a comprehensive view of the firm's profile for both strategy and identity, balancing both specific answers to pointed questions and more candid, sense-giving answers to open-ended questions. Table 8 illustrates these interrelationships.

The multimethod approach suggests that Prospector behaviour and Defender behaviour could be consistently measured by both qualitative and quantitative means (r = .469, p<.05; r = .429, p<.05, for the relationship of Prospector qualitative and quantitative measures and the relationship of Defender quantitative and qualitative measures, respectively). Individualistic behaviour and Collectivistic behaviour could also be consistently measured by both qualitative and quantitative means (r = .539, p<.01; r = .854, p<.01, for the relationship of Individualistic qualitative and quantitative measures and the relationship of Collectivistic quantitative and qualitative measures, respectively).

The negative relationship between the questionnaire's Individualistic and Relational orientations and between Relational and Collectivistic orientations (r = -.714, p<.01; r = -.518, p<.05, respectively) follows intuition however it was disappointing that only Relational and Individualistic orientations were significantly nuanced from the qualitative identity results (r = -.796, p<.01), indicating that the interview measure did not provide sufficient discriminant validity among sub-components of identity orientation construct. Despite this the overall multimethod results suggest convergence between different measures of identity and strategy respectively.

Table 8
Intercorrelations Between Constructs by Method

Method and Trait	1	2	3	4	5	6	7	8	9	10	11	12	13	14
1. I[a]- Prospector	-	-.253	-.431*	-.308	.469*	.082	-.486*	-.072	.079	-.367	.449*	-.216	-.061	.348
2. I-Analyzer		-	-.265	-.167	.082	-.110	.004	-.464*	.314	-.262	-.084	.146	-.166	.052
3. I- Defender			-	-.185	-.477*	-.015	.429*	.074	-.383	.468*	-.129	-.164	.307	-.227
4. I-Reactor				-	-.294	.010	.214	.192	.098	.043	-.222	.117	-.042	-.085
5. Q[b] Prospector					-	-.023	-.709**	-.528**	.266	-.407*	.218	.237	-.410*	.280
6. Q-Analyzer						-	-.495*	-.169	-.363	.518**	-.237	-.284	.390	-.195
7. Q-Defender							-	.077	.092	.066	-.247	-.010	.212	-.283
8. Q-Reactor								-	-.187	.037	.236	-.114	-.021	.168
9. I- Individualistic									-	-.796**	-.330	.539**	-.254	-.305
10. I- Relational										-	-.308	-.317	.451*	-.240
11. I-Collectivistic											-	-.353	-.304	.854**
12. Q-Individualistic												-	-.714**	-.228
13. Q-Relational													-	-.518*
14. Q-Collectivistic														-

Note: [a]Interview percentage score. [b]Questionnaire percentage score.
*p<.05. **p<.01.

A firm's total make-up score for each of the strategic typologies and identity orientations was analyzed in conjunction with performance metrics. If strategic typologies could exhibit a relationship to identity orientations, and one or both of these constructs had a relationship to performance, it would suggest evidence of modest support for the model in Figure 1 of this study, which could be in turn explored through further study. The interrelationships are presented in Table 9.

Variables which suggested natural compatibility in the qualitative analysis were not significantly correlated, save for Defenders with Relational identity (r = .415, p<.05) and Prospectors with Collectivistic identity (r = .414, p<.05). There were no significant relationships between strategic typologies and performance or identity orientations and performance, save for Reactors who are negatively correlated with Client Retention (r = -.427, p<.05); Employee Retention (r = -.576, p<.01); and Gross Margin (r = -.566, p<.01), respectively. An interesting finding was that Individualistic identity has a negative relationship with Client Retention (r = -.426, p<.05), which is consistent with Brickson's (2007) propositions for instrumental and decoupled ties between Individualistic firms and their clients.

The multiple correlations between performance metrics may indicate the need for future research to refine the measures. The researcher ran a factor analysis in the hopes of simplifying and strengthening the relationships between performance metrics and the identity/strategy constructs. The analysis generated two factors, one which relied heavily on "market metrics" such as market share, sales growth, gross margin and overall performance, and the other which relied heavily on "people metrics", such as client retention and employee retention. These factors possess face validity yet these results must also be approached with caution due to the small sample size, which could be deemed too limiting for factor analysis. To counter this concern, the factors were deemed strong enough for inclusion according to the Kaiser criterion, although it too has been recognized to have practical limitations in statistical analysis (Floyd & Widaman, 1995).

Running a new correlation matrix with the two factors provided negligible improvements over the results of Table 9 as only the Reactor construct had a significant relationship with the “Market Metrics” variable (r = -.528, p<.01).

Table 9

Intercorrelations Between Strategy, Identity and Performance

Firm Profile Traits	1	2	3	4	5	6	7	8	9	10	11	12	13
1. [a]Prospector	-	-.055	-.652**	-.400*	.078	-.392	.414*	.164	.341	.128	.153	.341	.026
2. Analyzer		-	-.255	-.332	.132	-.037	-.121	-.014	.142	.198	-.152	.042	-.010
3. Defender			-	-.027	-.282	.415*	-.246	-.076	-.074	.151	-.022	-.060	.066
4. Reactor				-	.037	.009	-.059	-.334	-.427*	-.576**	-.299	-.566**	.319
5. [b]Individualistic					-	-.702**	-.362	-.025	-.426*	-.053	.120	-.062	-.081
6. Relational						-	-.410*	-.078	.136	.036	-.273	-.158	-.085
7. Collectivistic							-	.134	.368	.020	.204	.286	.216
8. [c]Relative Market Share								-	.190	.244	.812**	.529**	.765**
9. Client Retention									-	.599**	.073	.303	.278
10. Employee Retention										-	.093	.395	.425*
11. Sales Growth											-	.507**	.754**
12. Gross Margin												-	.740**
13. Overall Performance													-

Note: [a]Strategic typologies. [b]Organizational identity orientations. [c]Performance metrics.
*p<.05. **p<.01.

DISCUSSION

Result Interpretation

The results create a mixed but overall promising portrait of what parallelisms may exist between firm identity and strategy when viewed through the lens of strategic typology and identity orientation. These results suggest that for IT consulting firms in Ottawa a variety of strategies and identities can be viable, and the parallelisms they create can be observed as characteristics that are exhibited through both their strategic and identity orientation. In other words, the way in which firms act towards others in their environment and how they will use these others to move their objectives forward share some commonalities or parallels. This finding is further strengthened by the use of the multimethod approach; findings reflect the way the top manager sees the firm, a self-typing approach, and reflects the way the researcher saw the firm, an observational approach which captured these parallelisms.

The exploratory nature of the study did not allow for the design of hypotheses a priori, rendering it difficult to ascertain whether these results have clarified or slightly muddied the question of parallelisms between strategy and identity. The qualitative results suggest that some parallelisms, these similarities operating on strategy and identity planes, exist however there is no way to qualify the number of parallelisms observed. Individualistic Prospectors and Relational Defenders were observed to each have three parallelisms; is this preferable to one, two, or more parallelisms? The results here cannot qualify whether these parallel themes between the concepts of identity and strategy, are “sufficient” for the firm in which they are found: but sufficient parallelisms for what purpose? Why would parallelisms be beneficial? This study sought to scratch the surface of the anticipated overlap between these two concepts in the hope of tying their relationship to firm performance. A strategy is not an identity and an identity is not a strategy. Strategy is forward-facing (Miles & Snow, 1978); identity is embodied in the present state of the organization (Albert & Whetten, 1985). Despite these differences, both are decision-making tools and it is reasonable to assume that when making decisions, the tools used and the analysis provided by using those tools should possess some sort of convergent validity.

Although not all strategy/identity pairings were both qualitatively and empirically supported, the significant relationships of Collectivistic Prospector and Relational Defender respectively lend support for future exploration of the concept. Although not part of the research design, an interesting relationship was observed between top management (or participant) tenure and Individualistic identity orientation (r = -.411, p<.05); this result may suggest that as participants became more comfortable in their role within the firm, they tended to focus less on the firm itself and more on its partners whose relationship they valued. This finding should be approached with caution, as it does not imply that other identity orientations should be favoured over Individualistic identity. Brickson contended that "each organizational identity is associated with particular strengths, talents, and contributions. When organizations are at their best, they are both true to their identity orientation and realize its full positive potential" (2007, p.871). But what of firm types, of particular strategy and identity pairings, which were not intuitive? This study cannot determine whether these pairings are a poor fit for the organization which possesses them, nor whether it is in the interest of the firm to rid itself of these pairings. Brickson (2007) suggested identity orientation is a relatively stable facet of identity however she acknowledged that hybrid identities can occur in organizations. Considering the prevalence of multiple identities, it is plausible that unexpected pairings such as Individualistic Defenders are merely a case of managed multiple identities, perhaps by segregation or compartmentalization (Pratt & Foreman, 2000) which conveyed only one aspect at time of study.

The second research question, will these parallelisms affect firm performance, is difficult to interpret from these results. As mentioned, the number of parallelisms discovered do not guide the interpretation of how many, and in what combination, these parallelisms would impact firm performance. The performance measures proved generally insufficient to distinguish nuances between firm performance in both a qualitative and quantitative sense; is there significant difference between a Relational Prospector doing “very well” and a Relational Analyzer doing “exceptionally well”? Although participant firms were subject to multiple measures to capture performance, it is plausible that participants did not fully disclose their firm’s performance in its entirety, preferring to keep their discussion with the researcher at arm’s length.

The qualitative measures revealed several commonalities between firms, irrespective of their identity orientation or strategic typology which may warrant further research. In general, firms rely on performance metrics which are consistent with identity-based traits. Performance lags on the other hand may use language representative of strategy, identity, or both. The metrics described by participants were fairly consistent across the entire sample, such as margin and number of consultants out on contract, perhaps due to the industry’s heavy reliance on these factors. Jarvis et al.’s study (2000) netted a variety of metrics, which in hindsight may be attributable to its random sampling of firms in a given geographical area, rather than the focused, singular industry design of this study. The one finding consistent with the literature on which the measures were based was the tendency for small firms (i.e. 25 employees or less) to observe cash flow more closely than larger firms (i.e. 26 or more employees), whereas these larger firms define performance more readily with accounting-driven metrics such as stock price and net profit (Jarvis et al., 2000).

As discussed the quantitative metrics correlated too closely with one another, suggesting that the performance measures should be revised. Chakravarthy (1986) suggested that well-adapted firms are more likely to have a strategy congruent with the 7-Ss: strategy, structure and systems, the hard Ss, and style, shared values, skill and staff, the soft Ss (see Waterman, 1982). Although the research design endeavoured to provide a “softer” measure of firm performance by its open-ended questions, the onus should have been placed on the researcher to push participants’ thinking beyond the immediate and “satisficing” (Simon, 1945) answers to performance questions and onto a broader view of their firm’s success, which may have steered the conversation towards “softer” conceptions of performance. Identity is a soft concept, an elusive and often difficult construct to measure (Brickson, 2005). In this study soft, latent concepts proved difficult to tie to conventional measures of performance. Chakravarthy suggested that firm “excellence” should be measured by more than numbers, as this values only the definition of firm excellence as held by stockholders. Firm performance should be assessed by a number of perspectives (Venkatraman & Ramanujam, 1986), which should include input from all key stakeholders to the firm, as their cooperation is essential to continued firm success (Chakravarthy, 1986).

Strengths and Limitations of Study

This study has several strengths. First, this study sought to combine a specific conceptualization of strategy with a specific conceptualization of identity and seek parallelisms between the two, an original concept. Identity is an abstract concept difficult to operationalize. By attempting to bridge the conceptual/empirical divide, this study has offered some initial evidence of how strategy and identity literatures can be combined for further empirical research. Although not all the results of the multimethod approach were significant there exists some support for the continued use of multiple measures to assess abstract concepts such as identity. Organizational identity orientation as a particular facet of identity allows for intra-firm comparison of what is central, enduring and distinct about a firm because it frames this discussion around the stakeholders with whom the firm interacts, admittedly a broad frame of reference but one which nonetheless permits the comparison of firms by contrasting how, and with whom, they interact. The suggested parallelisms in this study may not put to rest the strategy/identity debate but they do shed light on the little known interactions between these concepts.

Second, this study also contributes to the organizational identity field of research by assessing, measuring and reporting on the concept, an area which had been lacking in recent years (Corley et al., 2006). Although Brickson's (2005) measure had been validated in her study, this researcher was unable to find another study replicating the measure of organizational identity orientation; this study offers partial support for its external validity. Third, the organizational identity field also benefits from a study which exposes the concept to a particular industry context that is arguably quite different from the law firms (Albert & Adams, 2002; Brickson, 2005), co-operatives (Brickson, 2005; Foreman & Whetten, 2002) and creative arts (Glynn, 2000; Voss et al., 2006), which have been the crutch of identity researchers. Although any industry benefits from basking in the glow of research, knowledge-intensive industries may particularly benefit from their efforts. Rylander and Peppard (2003) argued that a different model of the identity/strategy relationship needs to be elaborated for industries such as the high tech sector, as change is more prevalent and industry boundaries are ill-defined. It is acknowledged that this study did not provide that dynamic model however bringing to the attention of researchers this small yet diverse industry may push research energies in their direction. Lastly, the preliminary findings demonstrate the merit of the research questions explored in this study. Further research is warranted as the workings of the black box of identity/strategy remain hidden.

The interpretation of the results of this study is not without its caveats. First, concerns regarding the measures must be acknowledged. The difficulty in distinguishing between good, great and bad firm performance may be attributed to the measures which did not fully capture the concept of “good performance” as adequately as previously anticipated. It is also plausible that the specific combination of organizational identity orientation, strategic typology and firm performance are together not the best interpretation of the research design. The operationalization of identity in this study does not capture other facets of identity within a firm other than professed identity (Soenen & Moingeon, 2002). Professed identity, defined as identity that is articulated by top management, can be future-oriented and can be related to identity aspirations, which is not consistent with the data collection’s intent to capture the firm “as is”. The other facets of identity which were not captured in this study include projected identity, as it is seen through its media interactions with various audiences, experienced identity, as it is perceived by members, manifested identity, as it is visible through the firm’s routines and rituals, and attributed identity (or image), as it is constructed by external stakeholders (Soenen & Moingeon, 2002).

Second, limitations regarding the sample must be addressed. The design allowed for only one member of the top management team from each firm to be interviewed, which reduces the objectivity of the results. Participants may have been projecting their own insights onto the firm’s reality, although they were counseled to discuss the firm as it is and not as they wished it to be. From the results we cannot discern between reality and individual perception. Future studies may benefit from validating claims through multiple data sources. The resultant strategy/identity pairings must also be approached with caution. Within the previous studies validating the measures (Brickson, 2005; Conant et al., 1990), pure types were rare, and in this study they were non-existent. Although typologies are not intended to be rigid prescriptions of firms (Brickson, 2007), the “mixed” firm profiles of identity and strategy exhibiting to varying degrees some or all of the sub-typologies make the interpretation of results more challenging.

Third, as this study has highlighted the importance of the organic perspective, the periodization of the study must be called to attention. The measures provided a snapshot in time; the operationalization of concepts could not measure a firm’s ability to maintain its parallelisms over time, or whether change from the environment impacted the firm’s parallelisms after data collection. The same limitation applies to the assessment of performance; the measures captured performance in the previous year but did not allow for trending in year over year comparison. It is possible that if firms were revisited some would have succumbed to difficulties, perhaps related to their identity/strategy dyad. The measures of performance were isolated to a given timeframe however reaching further into the past would likely have decreased the accuracy of the data as the measures relied solely on the participants’ ability to recall from memory (see Wolfe & Jackson, 1987).

Lastly, two events in the IT consulting industry’s environment which occurred during data collection may have influenced the results: a recession which impacted most of the Western world, as well as a collusion scandal within the industry in the Ottawa area. News broke of a bid-rigging scandal in which 7 companies were convicted of colluding to fix their prices for various Government-tendered pieces of business worth more than $65 million

("Ottawa-area IT firms charged with bid rigging government contract", 2009). The fear of being associated with such a scandal, of being accused of collusion, was present in the Troubling Event scenario presented by several participants during the interview phase. Speculation would suggest that these events may have affected participant firms in a number of different ways and may continue to do so for some time.

Contribution to the Field: Future Research Propositions

This study has endeavored to address the strategy/identity dyad and peer into the inner workings of the black box to explore what parallelisms can and perhaps should exist between the two concepts. Although the findings in this study cannot lend full support to the premise, the parallelisms discovered between strategic typology and organizational identity orientation suggest that further research is warranted.

Strategy researchers have long argued the strategy/structure debate, determining which foot followed the other (Amburgey & Dacin, 1994; Mintzberg, 1990). Attention is now turned to the identity/strategy dyad to discover how they interact. Opinions remain divergent as to which concept leads the firm, which foot moves forward first. Whetten (2006) advocated that identity should guide the firm, lest it lose its central, enduring and distinct elements. Lerpold, Ravasi, van Rekom & Soenen (2007) cautioned not to assume identity should always guide strategy formulation and implementation; there are many circumstances in which top management's primary role must be to introduce a strategy which counters the established norms and values of the current identity if the organization is to survive. "Like a double-edged sword, identity can be a strategic enabler or a core of rigidity" (Lerpold et al.,2007, p.244).

If this holds true, there is perhaps a limitation to how much each decision-making tool, a firm's strategy and its identity, should "talk" to one another, act in parallel, or how much of the other they must share. If identity and strategy share too much of one another, it may limit the organization's ability to maneuver within its environment. If they share too little, there may be a disconnect resulting in a failed strategy or an alienated stakeholder group (Ackerman, 2006). Balmer, Stuart and Greyser suggested identity and strategy should be aligned, but not perfectly so: "[…] indeed, it would be hazardous if this were to be the case as in our view that would characterize a myopic and moribund institution" (2009, p.7). The identity literature suggests a certain level of disagreement between top managers' understanding of the firm may beneficial to firm performance (Voss et al., 2006); it is possible that an inverted-U type relationship exists between the parallelisms of strategy and identity. Figure 2 proposes the ideal level of parallelism which should exist between strategy and identity.

Proposition 1: There exists a preferred or ideal level of parallelism between strategy and identity within firms.

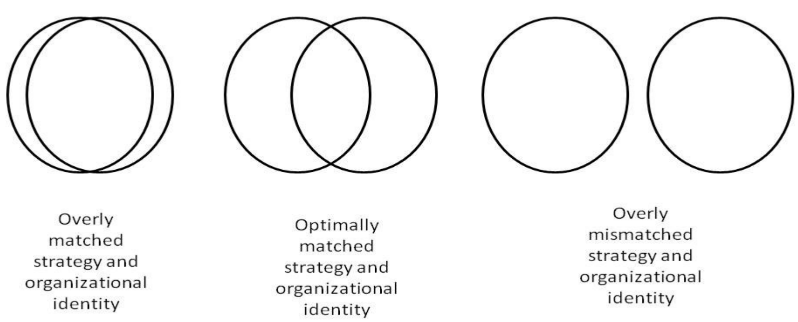

Figure 2: The ideal level of parallelism between strategy and organizational identity

Population ecology suggests that a firm's environment is subject to change and that this change may elicit competitive response for firm survival. If firm performance is threatened in any drastic, negative way it will likely prompt a response from top management to change something, whether it is strategy or structure (Aldrich, 1979; Keats & O'Neill, 2001). Miles and Snow (1978) suggested all "good" firms, characterized as stable and capable of success, can anticipate change in their environment and are able to modify themselves accordingly—assuming the shift is not too great for their firm's particular strategic parameters. Similarly, the organizational identity literature has chronicled firms in which their identity was faced with a change dilemma that jeopardized firm survival (Fox-Wolfgramm et al., 1998).

We have not yet begun to scratch the surface of how identity and strategy may be managed together in cases of plurality, whether they are plural strategies or plural identities, or both. How plurality is managed may have significant performance implications, just as the management of multiple identities may impact employee or organizational performance (Albert & Adams, 2002). Pratt and Foreman (2000) suggested that the choice of managerial responses to juggling multiple identities may be impacted by the potential strategic value of leveraging the identity facet in question. Sillince (2006) paired the resource-based view theory to organizational identity to propose a two way link between identity and resources. He suggested firms can leverage identity as a resource to improve competitive advantage, such as angling a distinctive identity as a rare resource; could strategy thus be levered as a means of identification?

There is merit in pursuing the identity/strategy dyad and how it can be managed, which echoes the call Wernerfelt (1984) made to researchers when he acknowledged that little is known about the difficulties of identifying and utilizing strategic resources. Whetten (2006) warned that to mismanage identity may cause the firm to become unrecognizable; future studies could also examine cases of firms that have not successfully balanced the demands of the strategy/identity dyad.

Proposition 2: The strategy/identity link to performance will be impacted by how parallelisms are managed.

Incorporating the idea of "managing" into the propositions begs the question of how social actors, the stakeholders with whom the firm interacts, are treated. Identity orientation has already suggested implications for understanding firm behaviour towards key stakeholder groups (Brickson, 2007), which was somewhat lacking in Miles and Snow's (1978) seminal work. Miles and Snow do offer possible linkages to management theory whereby the Human Relations model, in which employees have universal need for belonging and recognition, may likely be more prevalent in Defender and Reactor firms. The Human Resources management practices, whereby employees are untapped resources which can if well managed enhance firm performance, may be more probable in Analyzer and Prospector firms. The former strategic types have more formal communication channels, information systems and structure, which lends itself well to that model whereas the latter strategic types require a more dynamic, decentralized management structure offered by the Human Relations model. Although Miles and Snow (1978) offered preliminary support in their hospital study, they acknowledged their pairings are merely suggestive. Research has lagged in the operationalization of Miles and Snow's articulation of the relationship between the firm and its members, given the firm's strategic inclinations.

Brickson's study (2005) and subsequent propositions (2007) detailed specific ways in which a firm would relate to its stakeholders. She proposed that Individualistic firms will likely have transactional relationships with employees, founded on instrumentalist, calculative HR policies and procedures. Relational firms will have relational psychological contracts, as well as relational HR policies and procedures that are nurturing and seeking to bring out the best in people. Brickson also called for future research to investigate the pitfalls of each orientation type, and how to avoid them.

Brickson’s call for further research into the matter is not alone. He and Balmer (2007) echoed the need for identity/strategy research to explore the dyad’s impact on employees. Lumpkin and Dess (1996) suggested incorporating non-traditional measures of performance, such as employee satisfaction, may improve our understanding of the dynamic model of the firm and its interactions with the environment. Eisenhardt and Zbaracki (1992) advocated for the blend of psychological constructs into strategic decision-making research to better understand how strategy heuristics work; the use of organizational behaviour constructs in the research of parallelisms could be a useful first step in this direction.

This study examined what may be the overlapping elements, the parallelisms that may exist between identity orientation and strategic typology. The former is a construct which heavily dictates how members will perceive and interact with the firm, and the latter is a construct which heavily dictates the processes, structures and policies the firm will utilize in the accomplishment of its objectives. Individualistic and Prospector firms may be prone to excessive amounts of competition in an effort to be “on top”; could this be linked to likelihood of employee burnout? Relational and Defender firms may avoid addressing difficult interpersonal issues in its effort to maintain its high levels of client satisfaction; could this be linked with absenteeism, lack of organizational commitment, or higher levels of employee attrition? The potentially powerful influence of identity and strategy combined with the management of employees could be of great interest in future study.

Proposition 3: How the parallelisms between strategy and identity are managed will impact how employees act in relation to the firm.

Lastly, no examination of how employees are managed can be complete without a look to the top management team. Andrews suggested that leaders make all the difference in a successful firm: “Energetic personal leadership is necessary for continued growth and improved achievement in any organization. Leadership may be expressed in many styles […] This style must be natural and also consistent with the requirements imposed upon the organization by its strategy and membership” (1980, p.112). Ashforth and Mael (1989) echoed this sentiment when they suggested that transformational leadership can be linked to the use of identity symbols such as myths, rituals and corporate histories; Pfeffer (1981) has also noted the positive consequences of such symbolic actions. Social identification with the firm is related to organizational commitment and job satisfaction, variables that have been deemed to have a relationship to leadership (LePine, Erez & Johnson, 2002).

What role does the leader play in the strategy/identity dyad? A good leader may bolster members’ understanding of the parallelisms between strategy and identity, whereas a weaker leader may have difficulty articulating these parallelisms. The upper echelons paradigm has suggested that the characteristics of leaders may influence their strategic decision-making (Hambrick & Mason, 1984), a theory which could be used to explore the choices leaders make in relation to parallelisms and the factors which contribute to these decisions. Mental models of decision-makers have also been suggested as a useful paradigm through which to understand competition and strategic choices within and across firms in an industry (Porac, Thomas & Baden-Fuller, 1989).

Could the type of leadership have a moderating effect on the linkage of strategy/identity and performance outcomes? Charismatic leaders may be adept at fostering identification with the members they are trying to influence, and may generate buy-in for their strategies (Gardner & Avolio, 1998). This possible relationship between type of leader or leader characteristics and parallelisms could be of great interest in future studies.

Proposition 4: The type of leader within a firm will influence members' understanding of the parallelisms between strategy and identity.

CONCLUSION

This study has provided preliminary evidence of the parallelisms that may exist between strategy and identity when viewed from the lens of strategic typology and organizational identity orientation. The propositions put forth in this study are suggestive of future research avenues which can be taken to explore these parallelisms from either a strategy or organizational identity (or better yet, combined) lens.

Parallelism as a medium for exploring relationships between constructs is a distinct means through which to conduct research on the identity/strategy dyad. The usefulness of the concept lies in its simplicity; parallelisms as defined in this study do not require an explanation of the direction or purpose of interaction between identity and strategy to highlight their dynamism, particularly useful in an exploratory study. Keats and O'Neill echoed the study's intent in the use of parallelism in their description of the relationship between strategy and structure: “(they) are tightly interwoven and deeply embedded with one another. Rather than a singular causal relationship (in either direction), they occur simultaneously” (2001, p.536).

The results of this study suggest the concept of parallelism can give structure to the interrelationships as they were operationalized by strategic typology and organizational identity orientation. The impact of these relationships on performance is not entirely clear from the results, however the empirical investigation into the dyad’s impact on the firm is not without merit, as so few organizational identity studies provide empirical evidence (Corley et al., 2006).

The interpretation of the Relational and Individualistic Analyzers proved difficult, likely because other forms of strategy/identity relationships exist. Other studies may benefit from using mediums such as corollaries to explain their perspective on strategy/identity interaction, which may lend itself well to the extension of the “one foot in front of the other” analogy (Mintzberg, 1990).

The propositions in this study are a call to researchers to carry the concept of parallelisms forward. The purposeful omission of an operationalization for identity and strategy in those propositions allow for a wider interpretation of the interactions, and a myriad of possible study designs. Future researchers should be careful in their operationalization of organizational identity. Corley et al. (2006) suggested cautiously framing the approach to what is central, enduring and distinct about the firm. As organizational identity is a construct already considered latent, elusive and soft (Brickson, 2005), the way in which it is being assessed, more so than strategy, can adversely affect the generalizability of the research findings. Including the perspective of a variety of stakeholders will also likely be of benefit. Researchers should not be constrained by traditional conceptions of stakeholders such as employees and stockholders; it is likely that competitors, suppliers and the general consumer can contribute significant insights into the workings of the firm.

The study's lack of substantial evidence for a link to performance was disappointing, although the small sample size may be partly to blame. Identity and strategy each affect performance however this study does not allow us to further our understanding of the how and why these two constructs have an impact on firm performance. Future research may benefit from anchoring the link between the strategy/identity dyad and performance firmly before setting out into the field to collect data. It is likely that many mediums or perspectives on performance can be used and are useful. Ackerman (2006) suggested that identity and strategy, if they are not connected, will not allow the firm to succeed however he did not operationalize this failure to succeed. What is failure, in light of a lack of parallelism between strategy and identity? Researchers are encouraged to ensure performance is assessed through a variety of methods, measures and constructs as it relates to both identity and strategy. A concept that encompasses all that is central, enduring and distinct for a firm, or a concept that encompasses all that a firm will do to reach its goals, requires in turn that the performance measures used to evaluate it should capture its full contribution to the organization's success.

Lastly, it is recommended that researchers do not lose sight of the primary purpose for their study of the identity/strategy dyad, which is to convey results to the practitioners in the field. This research is important for the practitioner, simply put, for the same reasons knowing oneself is important for an individual. Self-knowledge guides our actions and our goals, knowing what we can and cannot accomplish (Ackerman, 2006). Brickson aptly noted of organizations: "Without a conception of who they are, it is impossible for entities to coherently act toward others and for others to know how to interact with them" (2007, p.866).

Identity and strategy are two such important decision-making tools, and they should be used in collaboration and to their full potential. As much as researchers may benefit from this exploratory study, it is this researcher's hope that decision-makers may use the preliminary findings in this study to shed perspective onto their own firm. The strategic typology and organizational identity orientation constructs are attractive in their simultaneous simplicity and complexity, they are both easy to understand yet cover so many areas of interest to the firm, including management practices, planning activities and stakeholder interactions.

Keats and O'Neill (2001) noted congruence between structure, processes and systems, a "fit" of a firm with itself is more important in impacting firm performance than the firm's overall fit with its environment. Similarly, Miles and Snow's (1978) typologies demonstrated "fits" of strategy, processes and management styles that "go together". They suggested that any of the good archetypes, all except Reactors, can sustain themselves within the same industry as long as each it true to itself and to its nature. Practitioners are encouraged to find a "fit" between strategy and identity parallelisms that works for them.

The preliminary results of this study suggest a key lesson for firm leaders: how the firm chooses to act towards others can be consistent with how they use these others to move their objectives forward. The Individualistic Prospectors in this sample whose employee and client relationships are instrumental are testament to this relationship. Brickson (2007) did not suggest that these relationships are wrong; rather each identity orientation's type of relationship can be used to maximize its potential and provide for its members desirable outcomes, such as Individualistic firms meeting individual members' need for personal self-esteem through ambition and innovation.

Top managers who possess an understanding of their firm's decision to act as it does may be best positioned to put forward strategies (and subsequently structure, systems, and policies) that are more consistently aligned with the identity facets they most cherish, likely a successful combination for the firm and for its members. Only when an organization truly understands its identity and strategy can the firm reach its full potential, when a firm can to its own self be true.

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Appendix A - Interview Questions

1. Please give me an overview of your firm and its work. What is your role in the company?

2. If your company were a person, how would you describe him or her.

3. What do you think is the most accurate motto of your organization?

4. What is the most important thing to keep an eye on to assess how well the business is doing? What is (are) your organization's performance metric(s)?

5. Based on this (these) metrics, how well is your firm performing?

6. What performance lags are currently keeping the company from reaching its organizational objectives?

7. Please take a moment to think about either an actual event or a hypothetical event that would be troubling to your organization if it occurred. Why was this actual event, or why would this hypothetical event be troubling to your organization?

(Pause for questionnaire. When finished, instruct the participant to review particular answers)

(Clarification points: On the first page when you described the size of your firm, are consultants considered in the tally? Researcher to indicate Y/N)

8. Please refer to your answers on the second page of the questionnaire. Question 1 asks how your organization views itself primarily, did you answer A, B, or C? Why did you answer (insert appropriate response)?

9. Question 2 asks what is most important to your organization, did you answer A, B, or C? Why did you answer (insert appropriate response)?

10. Question 3 asks what your organization is most concerned about, did you answer A, B, or C? Why did you answer (insert appropriate response)?

Appendix B - Questionnaire

Please indicate:

Number of years you have been with this company:______

Size of firm: ____________ employees (exact number or from this scale)

Less than 10 employees	More than 10 but less than 25	More than 25 but less than 50	More than 50 but less than 100	More than 100

Number of years the firm has been in operation: _______

Please rate:

On a scale from 0 to 10 (below), how well your business unit/organization has performed **<u>relative to all other competitors</u>** in the principal served market segment over the past year for the following areas:

Example: If you believe that your sales growth is **<u>greater than</u>** that of approximately 45% of all your competitors in your principal served market segment, rate yourself a 5 for sales growth.

Scale	0	1	2	3	4	5	6	7	8	9	10
Greater than __% of my competitors	0%	1-10%	11-20%	21-30%	31-40%	41-50%	51-60%	61-70%	71-80%	81-90%	91-100%

Relative market share:_______

Client retention:______

Contractor/consultant/employee retention:_____

Sales growth:______

Profit (gross margin):_______

Overall performance relating to objectives for this organization:_______

Below are 3 multiple choice questions. Please select the ONE answer for each question that seems to reflect what is most central, distinctive, and enduring about your organization. Please think of your organization as a whole and also about your organization as it is rather than how you might like it to be.

1. My organization views itself primarily as:

a) Distinct and standing apart from other organizations.

b) A good partner to those with whom it interacts (e.g. employees, clients, nonprofit organizations).

c) A good member to a larger community (all those with whom it interacts, as a common group; a group of organizations promoting a cause it cares about; local community; etc).

2. What is most important to my own organization is:

a) Working to improve the welfare of particular others with whom the organization has significant and gratifying relationships (e.g. employees, clients, nonprofit organizations).

b) Working to improve the welfare of a community it values and/or belongs to (e.g. all those with whom it interacts, as a common group; a group of organizations promoting a cause; local community, etc).

c) Working to promote and maintain its own welfare (e.g. profitability, image, etc.).

3. My organization is most concerned about:

a) Its relationship with a greater community it values and/or belongs to (e.g. all those with whom it interacts, as a common group; a group of organizations promoting a cause; local community, etc).

b) Its distinctiveness from other organizations.

c) Its relationships with particular others whose welfare it values (e.g. employees, clients, nonprofit organizations).

The following statements describe some characteristics of your organization or business unit. Please circle the one description from each question that best describes your organization.

1. In comparison to our competitors, the services we provide to our clients are best characterized as:

a) Services which are more innovative, and continually changing.
b) Services which are fairly stable in certain markets while innovative in other markets.
c) Services which are well focused, relatively stable and consistently defined throughout the market.
d) Services that are in a state of transition, and largely respond to opportunities and threats in the marketplace.

2. In contrast to our competitors, we have an image in the marketplace that:

a) Offers fewer, selective services which are high in quality.
b) Adopts new ideas and innovations, but only after careful analysis.
c) Reacts to opportunities or threats in the marketplace to maintain or enhance our position.
d) Has a reputation for being innovative and creative.

3. The amount of time our organization spends on monitoring changes and trends in the marketplace can best be described as:

a) Lengthy: We are continuously monitoring the marketplace.
b) Minimal: We really don't spend much time monitoring the marketplace.
c) Average: We spend a reasonable amount of time monitoring the marketplace.
d) Sporadic: We sometimes spend a great deal of time and at other times spend little time monitoring the marketplace.

4. In comparison to our competitors, the increases or losses in demand that we have experienced are due most probably to:

a) Our practice of concentrating on more fully developing those markets which we currently serve.
b) Our practice of responding to the pressures of the marketplace by taking few risks.
c) Our practice of aggressively entering into new markets with new types of service offerings and programs.
d) Our practice of assertively penetrating more deeply into markets we currently serve, while adopting new services only after a very careful review of their potential.

5. One of the most important goals in this organization in comparison with our competitors is our dedication and commitment to:

a) Keep our costs under control.
b) Analyze our costs and revenues carefully, to keep costs under control and to selectively generate new services or enter new markets.
c) Insure that the people, resources and equipment required to develop new services and new markets are available and accessible.
d) Make sure that we guard against critical threats by taking whatever action is necessary.

6. In contrast to our competitors, the competencies (skills) which our managers possess can best be characterized as:

a) Analytical: their skills enable them to both identify trends and then develop new service offerings or markets.
b) Specialized: their skills are concentrated into one, or a few, specific areas.
c) Broad and entrepreneurial: their skills are diverse, flexible, and enable change to be created.
d) Fluid: their skills are related to the near-term demands of the marketplace.

7. The one thing that protects my organization from our competitors is that we:

a) Are able to carefully analyze emerging trends and adopt only those which have proven potential.
b) Are able to do a limited number of things exceptionally well.
c) Are able to respond to trends even though they may possess only moderate potential as they arise.
d) Are able to consistently develop new services and new markets.

8. More so than many of our competitors, our management staff tends to concentrate on:

a) Maintaining a secure financial position through cost and quality control.
b) Analyzing opportunities in the marketplace and selecting only those opportunities with proven potential, while protecting a secure financial position.
c) Activities or business functions which most need attention given the opportunities or problems we currently confront.
d) Developing new services and expanding into new markets or market segments.

9. In contrast to many of our competitors, this company prepares for the future by:

a) Identifying the best possible solutions to those problems or challenges which require immediate attention.
b) Identifying trends and opportunities in the marketplace which can result in the creation of service offerings or programs which are new to the industry or which reach new markets.
c) Identifying those problems which, if solved, will maintain and then improve our current service offerings and market position.
d) Identifying those trends in the industry which our competitors have proven possess long-term potential while also solving problems related to our current service offerings and our current clients' needs.

10. In comparison to our competitors, our organization structure is:

a) Functional in nature (i.e. organized by department—marketing, accounting, HR, etc).
b) Service or market oriented (i.e. cross-departmental).
c) Primarily functional (departmental) in nature; however, a service or market oriented structure does exist in newer or larger service offering areas.
d) Continually changing to enable us to meet opportunities and solve problems as they arise.

11. Unlike our competitors, the procedures we use to evaluate performance are best described as:

a) Decentralized and participatory encouraging many organizational members to be involved.
b) Heavily oriented toward those reporting requirements which demand immediate attention.
c) Highly centralized and primarily the responsibility of senior management.
d) Centralized in more established service areas and more participatory in newer service areas.