# Being and becoming: Reconciling the temporal mismatch between organizational identity and strategy by providing identity with a future

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## Abstract

Organizational strategies and identities are tied tightly to each other: what an organization decides to do (strategy) depends significantly on who it is taken to be (identity). This relationship however very often involves a "serious mismatch", with strategy traditionally focused on the future and organizational identity largely rooted in the past (Ravasi et al., 2020:6). This temporal discrepancy can become problematic when executives seek to enact a different future for their organization. While the strategy field has taken a recent 'history turn' which extends strategy's temporal reach to the past, organizational identity scholarship has yet to take a deliberate and detailed reciprocal turn toward the future. This essay explores what an explicit 'future turn' for organizational identity might entail. It also assesses how reconciling the temporal dynamics of strategy and identity in senior executive conversations can be seen as central to the development of innovative and effective new strategic directions.

**Introduction**

An important problem for senior executives is reconciling organizational strategy (what we plan to do) with its focus on the future, and organizational identity (who we have been and now are) with its focus largely on the past. This challenge emerges as especially critical when executives are creating new strategic directions for their organizations - prompted by mergers and acquisitions, environmental changes, technological and social innovations, industry transitions, and/or strategic shifts.  Such situations demand new and different conceptions of the organization's future, the enactment of which often requires executives to consider changes to not only their organization's strategy, but also its identity.

A change in an organization's identity is required with a new conception of the future because identity and strategy are interdependent; identity frames and shapes strategy while strategy enacts and informs identity (Ashforth and Mael, 1996; Schultz and Hernes, 2020; Sheard, 2009). Despite their interdependence, identity has largely been seen as "grounded in the past" (Ravasi et al., 2020:6) while strategy has been viewed as primarily focused on the future (Chandler, 1962). This temporal mismatch leads to the important connection between organizational strategy and identity being experienced by executives as somewhat loose and indirect, and possibly incompatible, potentially limiting the scope, innovativeness, and effectiveness of new strategic directions.

While the temporal mismatch between organizational strategy and identity has begun to be addressed by the 'history turn' in scholarly and practical discussions of strategy (Argyres et al., 2020), the organizational identity scholarship field has yet to take an analogous and explicit 'future turn'.  Although temporality is core to the concept of identity (Albert and Whetton, 1985; Gioia et al., 2000; Schultz and Hernes, 2013) with an organization's identity linking the past, present and future, identity has traditionally been regarded as a logic (March and Olsen, 2011) inherited from the past rather than as a logic that can also be explicitly derived from future scenarios. This essay thus explores what a future turn in organizational identity might entail, and how reconciling the temporal dynamics of strategy and identity can assist executives formulating new strategic directions.

To do so, I draw on scenarios in the context of scenario planning - an established way executives explicitly engage with the future (Schoemaker, 1993; Van der Heijden, 2005; Wack, 1985).  Scenarios are descriptions of an organization's possible future context that executives use to understand how things might change, and to explore what they might do and who they might become in the face of these changes. As such, scenarios are "imagined worlds" (Wolf, 2012) within which executives can conceptually simulate (Farjoun, 2008) new organizational identity and strategy possibilities (Van der Heijden, 2005) without imperiling the current identity (Tooby and Cosmides, 2001) or having to worry about real-world strategic consequences. Simulating future identity possibilities with scenarios suggests how a future turn in organizational identity can be achieved, and when incorporated into a process model (Pettigrew, 1992)  how identity and strategy can be temporally reconciled.  Using scenarios in this way suggests how organizational identity and strategy can be considered explicitly in tandem and made to work interdependently across time with beneficial outcomes for formulating and implementing new directions.

The outcomes of temporally reconciling organizational identity and strategy are twofold.  First, it shifts organizational identity from being a secondary concern to being core to the creation of new strategic directions.  With strategy framed and shaped by identity, explicitly simulating future identity options using scenarios rather than taking identity as only inherited from the past, provides the opportunity for executives to see their strategic situation anew and to generate innovative and novel directions.  And by temporally aligning identity and strategy, these two important elements of organizational success can cease to be experienced as loosely connected, even potentially in opposition.

Second, using scenarios to help reconcile organizational identity and strategy temporally can help executives overcome the challenges of implementing new directions.  Using scenarios to imagine what is coming from the future context and simulating identity and strategy responses provides a safe space (Bojovic et al., 2020; Ramirez and Drevon, 2005) for executives to explore and become comfortable with changes well before commitments are required (Brown and Starkey, 2000; Lang and Ramirez, 2017).  In addition, with organizational identity providing a

meaningful and relatable logic (March and Olsen, 2011) for strategic choices, new directions can more easily become infused with a purposefulness and energy that can propel action (Rao and Dutta, 2018) and lead to improved organizational outcomes, including better financial performance (Gartenberg et al., 2019).

To begin the essay, I explore the relationship between organizational identity and strategy, and the implications of their traditional temporal mismatch.  I then introduce scenarios to propose how a future turn in organizational identity can be achieved.  This proposed future turn enables a process model to be outlined providing a set of propositions for temporally reconciling organizational identity and strategy in senior executive conversations (Van der Heijden, 2005).  Finally, I discuss key insights of the model for strategic management, in particular for formulating and implementing new strategic directions.

## Organizational identity, strategy and their temporal orientations

This section defines organizational identity and strategy in the context of creating new directions, and explores their relationship, as well as their traditional contrasting temporal orientations.

**Defining identity**[1]: Organizational identity refers to how senior executives define the central and temporally coherent attributes of their organization that make it distinct from others (Albert and Whetton, 1985; Gioia et al., 2013; Whetton, 2006). Centrality refers to executives' deeply held beliefs (Corley et al., 2006) and claims about who the organization is "without" which it "would be a different kind" (Whetton and Mackey, 2002:16). These beliefs and claims are reflected in its practices, structure, and strategies, etc. (Schultz and Hernes, 2013; Whetton, 2006). Temporal coherence refers to the way in which the organization's identity links the past, present and future, as well as the complementary processes of identity sensemaking and sensegiving (Ravasi and Schultz, 2006) that executives engage in over time.  Finally, distinctiveness refers to how the organization is, or might be in the future, different from relevant others including in a

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[1] I use identity and organizational identity interchangeably for ease of reading, acknowledging that identity exists at multiple levels including from individuals to a nation and beyond (Ashforth, et al., 2011; Irwin et al., 2018). When I refer to identity therefore, I am referring to it at the organizational level, unless otherwise specifically stated.

"distinguished" way (Corley et al., 2006; Whetton, 2006:223) – or the "difference that makes a difference" (Bateson, 1972: 321).

Organizational identity provides a 'sense of self' (Gioia et al., 2013) – e.g., 'who we are' – that fundamentally guides executives as to what is appropriate and inspiring for the firm to do and not do (March and Olsen, 2011). "It is this visceral, profound sense of a collective self that the construct of OI [organizational identity] was intended to capture" (Ashforth et al., 2020:30). Reflecting the power of meaning that identity provides (Normann, 2001), it has been described by scholars as the 'central' (Ravasi and Canato, 2013) and 'most meaningful' construct in the study of organizations (Gioia as cited in Gioia et al., 2013)

**Defining strategy**[2]: Strategy here refers to pathways senior executives identify and choose to pursue for their organization to achieve sustained high performance, and which are made possible through the art of value (co)creation. It is about pathways because the new directions being formulated result from specific choices about how the organization is to achieve its purpose, goals, and interests (Rumelt, 2011). Sustained and high performance refers to the intent to achieve success over the longer term, as compared to only in the short-term, including in relation to others (Chandler, 1962; Powell, 2001). Finally, strategy is the art of (co)creating value (Normann and Ramirez, 1993) acknowledging that developing and realizing new directions that generate value foregrounds the skilful, insightful, entrepreneurial, and hard strategic management work required by executives (Leiblein and Reuer, 2020; Teece, 2012; Whittington, 2008). It also involves leadership - in a survey of 60,000 executives, strategic leadership behaviors were identified as the "most critical to their organization's future success" (Kabacoff, 2014:3).

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[2] I use strategy and strategic management interchangeably in the essay as has become the convention in the field. However, I endorse Leiblein and Reuer's (2020:4) more nuanced position that conflating strategic management with strategy risks losing the foundational importance of the "role of management practice, as well as the centrality of the general manager in pursuing organizational effectiveness…hallmarks of strategic management research from the beginning". In agreement, when I use the term 'strategy', I am using it in the context of executives developing new strategic directions – 'doing' strategic management work.

Choices that are strategic can be thought of as related commitments (Ghemawat, 1991), consequential for other organizational choices made over time (Leiblein et al. 2018). As commitments, they are promises for the future (Van den Steen, 2017) defined apriori in the present (Collis and Ruckstad, 2008). Made by senior executives, strategic choices provide direction and co-ordinate action to realize the organization's purpose and its goals (Van den Steen, 2017).

**Relationship between identity and strategy**: While organizational identity is the answer to the questions 'who are we? who have we been? and who might we become?', organizational strategy answers the questions 'what do we do?, what have we done?, and what shall we do'? Identity and strategy can be thought of as interdependent (see Figure 1.) or "two sides of the same coin" (Ravasi et al., 2020:7) whereby identity can frame and shape strategy while strategy can enact and inform identity (Ashforth and Mael, 1996; Schultz and Hernes, 2020; Sheard, 2009).

**Figure 1**. The interdependent relationship of organizational identity and strategy
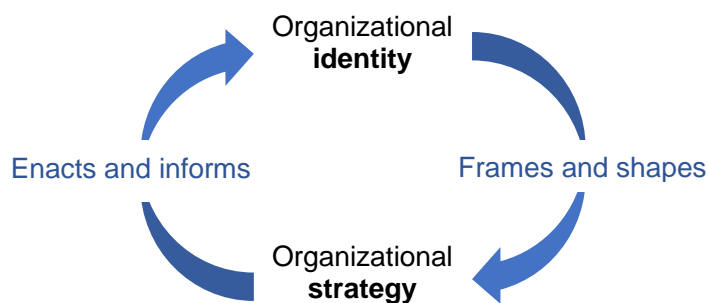


Identity frames and shapes strategy by providing a theory (Drucker, 1994) or logic (March and Olsen, 2011) about what is appropriate, meaningful, and exemplary for the organization (Albert and Whetton, 1985; Gioia et al., 2013; Navis and Glynn, 2011). The idea that much action is driven by what is perceived to be right (Leiblein and Reuer, 2020) and good (Whetton, 2006) has been described as "ancient" and "universal" (March and Olsen, 2011) and "one of the big ideas" in organizational studies (March, 2008:5). The ways in which identity frames and shapes strategy include: defining what is looked for in the environment (Felin and Zenger, 2017) and acting as a "perceptual screen" for not only what is noticed, but also how it is interpreted, and acted on

(Gioia and Thomas, 1996:372; Tripsas, 2009); signalling the organization's point of strategic difference and subsequently its competitive advantage (Barney et al., 1998); contributing to the assessment of 'strategic balance' (Deephouse, 1999); defining the boundaries and scope of the firm's activities (Raffaelli et al., 2019); and influencing resource allocation decisions (Bower, 1970; 2017).

Strategy in turn enacts and informs identity through activity and reflexivity (Gioia et al., 2010; March and Olsen, 2011; Sheard, 2009). Strategy has been described as "identity writ in time" to indicate how through strategic action an organization's identity is enacted, and, how by reflecting on this action executives become informed about the ways their organization's identity may need to evolve (Sheard, 2009:35). For example, Selznick (as cited in Scott, 2016) showed how leaders through "…the 'critical decisions' they make craft the organization's 'character structure' [including its values]: shaping its distinctive competence". Through enacted strategies executives learn about their organization and its environment with this learning being particularly important in changing circumstances (Brown and Starkey, 2000). In such conditions, the need for new strategic actions can emerge that can't easily be reconciled within current understandings of an organization's identity thereby informing reflections on potential identity changes.

**Temporal orientations:** While identity and strategy can be seen as interdependent, their temporal orientations have been regarded as opposites, leading to a potentially "serious mismatch" (Ravasi et al., 2020:6). While strategy has traditionally focused on the future seeking to establish pathways for anticipated success, identity has seen to be largely grounded in the past providing an inherited logic for guiding action. The outcome of this mismatch was well captured by Sasaki et al. (2020:594) who noted that "…over time organizations face a heightened tension between strategy making—which is oriented, by definition, toward the future—and backward-looking identity statements". Given that identity and strategy have been considered to be interdependent, there are two key risks of this temporal discrepancy for executives developing new strategic directions.

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First, taking identity as given from the past runs the risk of limiting the type and boldness of new strategic directions for the future (Raffaelli et al., 2019; Tripsas, 2009). In the complex, dynamic and novel conditions in which new directions are typically formulated, the past is not necessarily a reliable indicator of the future (Phillips, 2019), nor may it hold many useful analogies (Kay and King, 2020). In such conditions, options viewed through the lens of the past risk reinforcing the past identity and the strategic actions based on it (Anthony and Tripsas, 2016; Kogut and Zander, 1996). To create strategic directions that truly "depart from the status quo", it has been said that executives need to imagine and engage explicitly with the future so as to "create more degrees of freedom relative to the past" (Kaplan and Orlikowski, 2013:991,965).

A second risk of the temporal mismatch between strategy and identity is that executives experience the relationship between the two only as indirect or loosely connected, with changes in each treated separately and often with a lag in time between them. Because strategy has been regarded as the purview of the future, when circumstances change executives turn explicitly here to consider 'what to do' differently (Sillince and Simpson, 2010). Identity on the other hand has traditionally being perceived as related to the past and is experienced as more implicit and thus less familiar to engage directly. The combined effect is that strategy and identity conversations can become separated which can be costly and ineffective.

## Animating a 'future turn' in organizational identity using scenarios

Identity (who we are) and strategy (what we plan to do) can be made to work interdependently such that engaging both explicitly in conversations can lead executives to find more sustainable and innovative new directions. This engagement however is not straightforward given the way in which their dominant temporal orientations have traditionally been regarded - identity on the past and strategy on the future. To reconcile these temporal dynamics and, in particular, to explore a future turn in organizational identity to mirror the history turn in strategy (Argyres et al, 2020), I use scenarios, as developed in scenario planning. In this section, I discuss scenarios and use three case studies to illustrate how they can help executives link identity and strategy.

While the term scenarios is now applied to a range of ways of engaging with the future, some of these approaches are more closely related to forecasting and model runs than strategic scenario planning (Lang and Ramirez, 2021). In scenario planning, scenarios are plausible narrative descriptions of an organization's future context that co-exist in small sets (Spaniol and Rowland, 2019).

They are used to engage with situations characterized by deep uncertainty where working with probabilities is counter-productive (Knight, 1921). In the face of deep or 'irresolvable' uncertainty, executives cannot judge what is more or less probable, so attempting to use probabilities in such situations conceals and misleads (Kay and King, 2020). Instead, by working with equally plausible scenarios, executives make the uncertainty explicit and able to be engaged with, thereby turning the uncertainty into an asset. The situations in which new strategic directions are required (e.g., environmental changes) are typically constituted by this type of uncertainty.

Scenarios are developed by executives and stakeholders in courageous strategic conversations (Van der Heijden, 2005) to explore what might be coming from the future and to use those insights to inform choices and action in the present (see for example Ramirez et al., 2017; Schoemaker, 1993; Wack, 1985; Whittington, 2019). They are therefore not about planning for the long-term, but about reframing options in the present to inform strategy (Ramirez and Wilkinson, 2016).

Scenarios work by enabling executives to 'travel' to different points in the conceptual future and to look back and see their organization and their strategic situation in a new light from that temporal vantage. This is similar to the experience of Apollo 8 astronaut Bill Anders who in 1968 took the now famous picture of Earth as his spacecraft emerged from behind the moon and who later commented: "We came all this way to explore the moon, and the most important thing is that we discovered the Earth" (NASA, n.d) The image Anders took from a spatial distance changed our perspective of Earth, just as the temporal distance provided by scenarios can change perspectives of the present.

By exploring how an organization's future context may change, scenarios provide a set of "imagined worlds" (Wolf, 2012) within which executives can simulate new strategy and identity possibilities (Van der Heijden, 2005).  Usually between two and four scenarios are developed that usefully contrast with the 'ghost scenario' (Ramirez and Wilkinson, 2016) which can be thought of as the existing set of assumptions about the future context that would have to hold true to realize the firm's success (Ehrig and Schmidt, 2022).  By developing a small set of other equally plausible scenarios to the ghost (a contrasting set of assumptions), executives can reframe their understanding of the organization's situation and explore other versions of 'who they might become' and 'what they might do'.   As Brown and Starkey (2000:112) wrote:

> In this approach, managers are urged to relax their conventional modes of thinking to learn by setting aside their existing frames of reference – both epistemological and ontological.  The premise is that our present ways of knowing, and what we already know, form an inadequate basis for learning about an uncertain future.  Scenarios… are…explorations of, and the media for, exploring new identity possibilities (van der Heijden, 1996).

Three examples provide insight of how this works in practice. The first is Rolls-Royce, a large UK based firm established in 1904 by Charles Rolls and Henry Royce to produce and sell high quality cars, with the business now focused on producing power systems for civil and defence aerospace, marine and nuclear applications.  In 2014/15, the firm issued five profit warnings signalling executives' expectations about developments in the context - their ghost scenario - had not arrived as imagined.  The firm introduced scenario planning through a leadership programme which was described to this author as having the intention of creating "a new set of filters" (like the 'perceptual screen' discussed above) by which 150 executives could "think and talk differently" about their changing context.  One of the outcomes was a shift in the firm's identity from an engineering to an industrial technology company, emphasizing the invention of new technologies as compared to optimizing existing ones to address the decarbonization of power systems. This change is reflected on the firm's website: "The re-invention of Rolls-Royce is already underway. We're transforming what was once a traditional engineering company into a digital-first, industrial technology leader. Pioneering solutions to the world's vital power needs".  The shift in identity was also reflected in the senior appointment of a Chief Technology Officer in 2017.  Since the days of Henry Royce, the engineer in the original Rolls-Royce partnership, this

senior ranking position had been an engineering one.  Flowing through to strategy, the CEO
described the Chief Technology Officer role as being "accountable for maximising our
competitive advantage from the group's technology investment and for ensuring that our
technology strategy aligns closely with business strategy" (Rolls-Royce, 2017).

The second example is bp, a global energy company that was established in the early 20$^{th}$
century after being granted a 60-year license to search for oil and gas in modern day Iran.  The
firm produces energy products for heating, lighting and transportation.  With the world facing the
need to transition its energy systems away from fossil-fuels, a set of scenarios was developed as
part of its 2020 annual energy outlook to explore the deep uncertainty of this shift for the firm.
The outcome not only helped shape the firm's future strategy but also its its identity, as described
in the recent annual report (bp, 2021a):

> We have set our strategy to transform from an
> International Oil Company to an Integrated Energy
> Company focused on delivering solutions for
> customers…After more than a century defined by oil
> and gas through two core businesses, upstream and
> downstream, we set our strategy to become a very
> different energy company in the next decade.

A third example is from the European Patent Office (EPO), Europe's patent granting body. The
EPO is an independent multilateral organization governed by its own treaty and was established
soon after WWII as part of initiatives to help peace prevail among the continents' nations. By the
early 2000s, the increase in patent applications due to substantial growth in the knowledge
economy and international trade, as well as a questioning of the role of patents in society, was
signalling the possibility of a very different future context for the EPO.  A scenario planning
process was initiated for executives to explore these unfolding future possibilities and
subsequently develop new strategic options.  In doing so, the organization's identity was drawn
explicitly into the conversation as was reported in the internal magazine, the Gazette, after one of
the scenarios workshops (as quoted in Lang, 2018):

> Other spanners were thrown in the works by three
> external speakers who challenged our own comfortable
> notions of who we are and what we do as the European
> Patent Office.  We are very comfortable with our
> situation as a technical organisation routinely
> processing patent applications…[but] the external

speakers confirmed public misgivings about the patent
system and made us sit up with their comments that the
EPO is <u>seen</u> as a political organisation, as a legislative
organisation and an ethical standards organisation…
The questions arise, what do we <u>do</u> about those widely
held perceptions? Do we ignore them, try to live up to
them, adopt them as our modus operandi or mount a
PR campaign to dispel them? [emphasis in the original].

In summary, scenarios can provide a structured way for executives to explore and simulate

future identity and strategy possibilities (Van der Heijden, 2005) thereby enabling a future turn in

organizational identity and subsequently a temporal reconciliation with strategy.


## A process model for temporally reconciling organizational identity and strategy in executive conversations to create new directions

In this section, I develop a process model (Pettigrew, 1992) and a set of propositions to indicate

how executives can use scenarios to temporally reconcile organizational identity and strategy

when creating new directions.  In the next section (the Discussion), I discuss the beneficial

outcomes of doing so.


In brief, the model (Figure 2.) describes a process by which executives can:

- imagine scenarios and simulate future identity and strategy options (orange phases 1 and 2)

- connect these options with 'who' and 'what' the organization has been in the past (green phases 3 and 4), and

- iterate to formulate new directions that will position the firm well for the future (black phase 5).

**Figure 2.** A temporal process model for executive conversations to create new strategic directions (the orange loop renders the 'future turn' explicit in organizational identity).
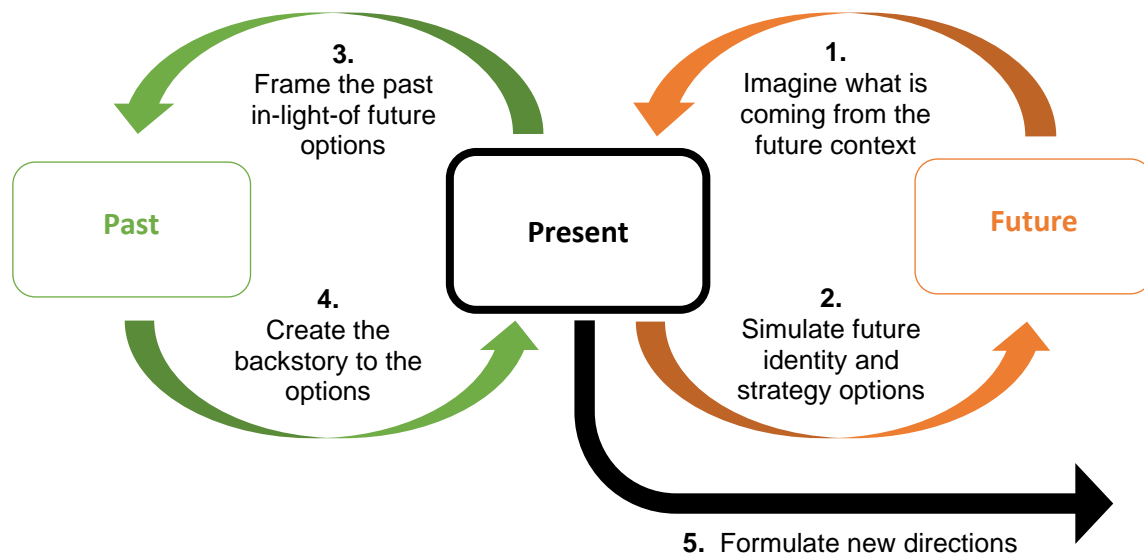


The model starts by engaging with changes coming from the future as it is from here that developments most often emerge raising questions for executives about the ongoing relevance of their organization's identity and strategy (Bouchikhi and Kimberly, 2003; Brown and Starkey, 2000; Whetton, 2006).  And as Rumelt (2011:76) noted, "All analysis starts with the consideration of what may happen…" - evident in all three case studies outlined above.

1.  **Imagine what is coming from the future context**: Assessing potential changes is helpfully enabled by imagination (rather than calculation) given there are no facts about the future context, nor can prior experience be assumed to apply (Alvarez and Porac, 2020; Kay and King, 2020). Imagination is defined by two characteristics; not being about the truth and not being connected to action (Berys Gaut and Stokes as cited in Liao and Gendler, 2019).  By not needing to tie possible future developments to claims of truth or implications for action, executives are free to explore a wide range of potential developments that push preconceived ideas of what is plausible.  In this way, imagining can loosen the hold of existing frames of reference (Levinthal and March, 1993) enabling identity and strategy to be looked at anew.

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Scenarios enable imagination by decoupling (Wolf, 2012) exploration of the future business environment from implications for organizational action (Normann, 2001); harnessing abductive reasoning (Steiner Saetre and Van de Ven, 2021) to provide plausible explanations for anomalies about changes in the environment; differentiating between the time horizons of the scenarios from the time frames of an organization's strategy thereby harnessing the creativity that comes from viewing the present from distant futures (Chen et al., 2020; Chiu, 2012); accounting for different speeds and types of change such as linear versus exponential (Lang and Ramirez, 2020); accommodating a pluralism of views (Thompson, 2018); and embracing productive disagreement (Nemeth, 2018).

The outcome of this phase is "imagined worlds" (Wolf, 2012) describing how the future context could unfold. This leads to proposition one: Developing scenarios enables organizational identity and strategy to be temporally linked, leading to productive outcomes for the creation of new strategic directions.

2. **Simulate future identity and strategy possibilities for new directions:** As imagined worlds, the scenarios provide settings within which executives can run 'what if…' experiments (Brown and Stuart, 2020) to explore identity and strategy possibilities for new directions. Such experiments are a form of conceptual simulation (Farjoun, 2008) carried out against the backdrop of information uncertainty which "…allows people to transform their current understanding by mentally constructing…alternative(s)" (Bell Trickett and Trafton, 2007:844). Running conceptual simulations constitutes a form of 'play' (Huizinga, 2016) that enables new identity possibilities to be considered without the current one being imperiled (Tooby and Cosmides, 2001) and for new strategic actions to be tried free of real-world consequences.

Conceptual simulation with scenarios involves three steps for executives (Brown and Fehige, 2019). First, is to generate a set of options derived from iterating between 'what we would do' (that would create real value) and 'who we would be' (that would make the organization distinct and distinguished vis a viz related others) especially to capitalize on the 'next big

thing' (Rumelt, 2011) each scenario highlights. The second step involves playing out these options across the scenarios so as to explore "…the self under various alternative outcomes…" (Markus and Nurius, 1986:966). The third and final step involves learning from these simulations in terms of what insights they generate about new directions. This three-step process can be repeated given step three (learnings) may generate and inform further simulations, that is, steps one and two.

The outcome of this phase is options for the pursuit of new directions. Proposition two therefore is: By bridging the temporal disconnect between identity and strategy, scenarios enable executives to generate a richer set of strategic options.

3. **Frame the past in-light-of future options:** Given the importance of temporal coherence for organizational identity and strategy, the future options need to be contextualized (Hatch and Schultz, 2017) in relation to the past. From this perspective, the past does not determine the future, but is interpreted in anticipation of it (Schultz and Hernes, 2013), or as Mead (1932:31) put it, "the novelty of every future demands a novel past". Creating temporal coherence in this way enables deeper insight for new directions and compels action as Kaplan and Orlikowski (2013:966) noted:

> …we found that actors could not enact new visions for the future without constructing strategic accounts that articulated how such futures connected meaningfully to a history of the company and its internal and external pressures. This process invariably comprised not only reimagining the future but rethinking the past...

Or as Heckscher et al. (2003:127) found in numerous case studies of transformational change, that such change can't be achieved without "…going back through the past…"

The process for contextualizing future options in relation to the past is a form of framing (Benford and Snow, 2000; Cornelissen and Werner, 2014; Cukier et al., 2021) where the scenarios and their identity and strategy possibilities provide executives with lenses to interpret the past. Such lenses bring into focus and foreground certain aspects of the past while backgrounding others, thereby shaping what is seen (van Hulst and Yanow, 2016).

The advantage of framing the past with the assistance of the scenarios is that it puts the organization's past in not one but several plausible contexts (Bredo, 2010). As such, a practical question for executives here is "What do we see when we look at the past through the lenses of the scenarios and their future identity and strategy options?"

The intent of this phase is to connect with the past in such a way that it helps rather than hinders the creation of new directions[3] (Suddaby et al., 2020). This leads to proposition three: The scenarios and their strategic options help executives frame the past in such a way that the past becomes an asset rather than a liability in the pursuit of new directions.

4. **Create the backstory to the options:** With the relevant aspects of the past framed or foregrounded, the story can be told of how they connect with future identity and strategy possibilities. An example of this is the bp case discussed above where scenarios helped the firm reconsider its future and recast its past in relation to the energy transition. In this case, the notion of 'transition' was being used to frame bp's past and to connect that past to its aspired future - as told on the company's 'History' webpage (bp, 2021b).

> Starting in 1908 with the discovery of oil in Persia, our story has always been about transitions – from coal to oil, from oil to gas, from onshore to deep water, and now onwards towards a new mix of energy sources as the world moves into a lower carbon future.

Telling such stories enables executives to "draw coherence from [the] past and establish direction for the future" (Kimberly as quoted in Fiol, 2001:692).

This form of strategic narrative (Barry and Elms, 1997; Heracleous, 2006; Vaara et al., 2016) is a backstory, defined by the Oxford English Dictionary as "a history or background story". In narrative theory, a backstory is like a prologue filling in relevant details about the past to provide context to the main story (Robertson, 2017). That is, a backstory describes the past in such a way that future options are seen as temporally coherent with it – as the bp example above illustrates. Backstories honour the past (Whetton, 2006), bring order and meaning to

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[3] I thank Rafael Ramirez for this observation.

change (Normann, 2001), resonate authenticity (Hatch and Schultz, 2017) and reliability (Oertel and Thommes, 2018), as well as inspire action (Weick, 1995). Backstories are regularly seen on the webpages of organizations under the headings 'Our story' or 'Our history'.

The outcome of this step is connecting the organization's past developments and achievements to proposed future options. Thus, proposition four is: Developing a backstory for the options achieves temporal coherence which increases the effectiveness of the options and helps ease their implementation.

5. **Formulate new directions:** Executives can iterate through the steps of this model until they feel they have generated a helpful new set of directions and pathways for the organization to achieve success. For example, although the model starts with the future, engaging with the past can generate insights that can trigger a new understanding of which assets built over time are liabilities and which are advantages for the future; things that might have been earmarked to be sold may subsequently be retained. A relook at plausible future developments and options can transform the valuation of what the past has brought to the table. Iterating across the future, present and past increases opportunities for learning (March, 2008) and the creation of novel directions (Kaplan and Orlikowski, 2013).

I have found three criteria executives can then use to guide the move from the generation and iteration of options to the formulation of directions. The first is resonance (Giorgi, 2017; Kaplan, 2008), that is, what options makes sense in the context of the future and the past that inspire executives? "The term resonance originates from the discursive sphere of *sound* and refers to an object's 'power or quality of evoking or suggesting images, memories, and emotions' (Oxford English Dictionary, 2016a)" [emphasis in the original] (Giorgi, 2017:716). From a temporal perspective, new directions resonate with executives when they combine powerful images of the future that are coherent with (suitably reinterpreted) memories of the past, and give meaning to action in the present.

The second criterion for judging options is whether they create distinctive value for the organization.  In "the end organizational success derives from being different" (Van der Heijden, 2005:xvii) in a way that contextualizes that future difference with the past.  Thus, the new directions should provide a competitive and/or a collaborative advantage for the future.

The third and final criterion is the degree to which the directions are robust in the light of future possibilities as reflected in the scenarios. Those that are robust across the scenarios can be directly implemented building on the past in the present, while those that are contingent can be addressed as future alternatives linked to forward indicators monitoring how the scenarios unfold.  In this way, the scenarios can help bring "stability" to strategic decisions in the face of deep uncertainty (Van den Steen, 2017:2623).

In summary, the model shows how the use of scenarios enables new organizational identity and strategy possibilities to be considered in tandem.   These possibilities can then be linked to the past in such a way they provide temporal coherence for who the organization has been and who it could become as well as what it has done and could do in the future.  As such, the model indicates how organizational identity and strategy can be made to work interdependently across time with beneficial outcomes that are discussed in the next section.

**Discussion and implications**

Situations where executives consider new directions for their organizations often require them to take into account changes to not only their organization's strategy, but also its identity.  Attending to both together however is not straightforward given the traditional temporal mismatch between the two.  To address this discrepancy, I have advanced a process model that articulates a future turn in organizational identity. It builds on and extends the history turn in strategy, allowing a temporal reconciliation between these two pillars of organizational success.  In doing so, I have found noteworthy implications for the practice and theory of strategic management, which I discuss in this section.

**Strategy formulation:** With a future turn, organizational identity shifts from being a secondary concern to being core to articulating new strategic directions. This is important because it indicates how executives can increase the possibility of creating truly new options for their organizations. An organization's identity reflects its "fundamental premises" and change at this level can facilitate transformative (and not only incremental) change (Brown and Starkey, 2000:112). There are three aspects to this.

First, organizational identity can help with reperception (Mukherjee et al., 2020; Ramirez and Wilkinson, 2016). Much strategy work is characterized by situations of complexity, novelty, and deep uncertainty (Kay and King, 2020) placing a strong emphasis on the ability of executives to reframe and reperceive their organization's strategic situation (Rumelt, 2011). With strategy being framed and shaped by identity, explicitly simulating future identity options with scenarios rather than simply taking identity as given from the past or related to the ghost scenario provides a structured way for executives to see their strategic situation anew and generate innovative directions.

Second, a future turn in organizational identity and the understanding that explicitly engaging with identity is core to the creation of new strategic directions diminishes the risk of identity and strategy being seen as loosely related. The consequence of seeing identity and strategy as separate can even lead to a perception they are in conflict which in turn can lead to inertia. Understanding how they can be made to work interdependently across time enables executives to harness them together effectively.

Third, the model sheds light on one of the most central discussions in the organizational identity literature – the degree to which identity is fundamentally enduring (Albert and Whetton, 1985; Whetton, 2006) or inevitably and always changing (Gioia et al., 2000; Gioia et al.,2013). The perspective explored here suggests that coherence over time, as seen from plausible future strategic positions, can be a more useful conceptualization of this dimension of identity in strategizing. That is, an organization's identity maybe changed through reinterpretation as part of

the pursuit of new strategic directions given a different future, but that change is perceived as coherent with the organization's past, as was seen in the bp example above.

**Strategy implementation:** Working through the temporal process model should not only help executives create valuable new directions, but also assist with their implementation. This is important because significant organizational identity and strategic change has been found to be challenging (Carroll, 1993; Ravasi and Schultz, 2006; Tripsas, 2009). There are three ways the implementation of the new directions can be helped.

First, the model will assist executives settle-in to the future by providing a safe space (Bojovic et al., 2020; Ramirez and Drevon, 2005) to explore and become comfortable with changes well before concrete commitments are required (Lang and Ramirez, 2017). Discussing the need to pursue new identity and strategy directions can be uncomfortable for some executives, not only because of the complex organizational ramifications (Ashforth and Mael, 1996; Hamilton and Gioia, 2010), but also because of the potential implications for their own professional and personal identities (Ashforth et al., 2011; Brown and Starkey, 2000). Multiple scenarios can act as transitional objects (Winnicott, 1971) enabling executives to explore the changes that will be needed between the past, present and future (Burt, 2003; Heckscher et al., 2003*).* In addition, directions that temporally cohere future, present and past can help executives embrace the novelty of the future by contextualizing that novelty in a relevant familiarity provided by the past.

Second, the temporal reconciliation of organizational identity and strategy can infuse the new chosen directions with a heightened sense of meaningfulness, generating a level of energy to inspire and accelerate implementation as well as aiding communication. As Rao and Dutta (2018:321) noted:

> For too long, strategy scholars have emphasized firm
> resources and analysis at the expense of social mobilization;
> as a result, strategy has become something to be explained
> to the rank and file, and not a vehicle to arouse enthusiasm,
> initiative, and energy. An identity-based strategy mobilizes
> confidence and enthusiasm.

Executives and other organizational members invest themselves in achieving their firm's strategy which often reflects a personal legacy they want to leave. Grounding the firm's new directions in an explicit sense of identity can highlight and harness a rich, human dimension to strategy (Engelke, 2018) and lead to improved organizational outcomes, including better financial performance (Gartenberg et al., 2019).

In short, ignoring the past in strategizing makes it harder to implement and to communicate new directions. Giving identity a future turn helps strategists to communicate and implement change more effectively.

Finally, the model draws attention to the ongoing temporal work (Kaplan and Orlikowski, 2013) to keep identity and strategy linked over time. Using forward indicators, scenarios can help executives navigate the future landscape to ensure their organization's identity and strategy continue to work effectively together. Such an approach enables executives to theorize and experiment (Camuffo et al., 2020) in a process of ongoing judgement (Packard et al., 2017) to successfully implement strategic directions in the context of unfolding conditions.

**Conclusion**

This essay has explored the benefit of temporally reconciling organizational identity and strategy in executive conversations by giving identity a 'future turn'. Using scenarios suggests a way organizational identity and strategy can be explicitly considered in tandem and made to work interdependently across time with benefits for strategy formulation and implementation. Doing this should assist both 1) executives engaged in developing new strategic directions for their organizations, and 2) strategy scholars interested in understanding and researching how organizational identity can be effectively engaged with in situations that require new directions. Such situations include successfully completing mergers and acquisitions, addressing environmental changes, undertaking technological and social innovations, and determining and enacting strategic shifts – situations that are increasingly common.

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