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In a family way? A model of family firm identity maintenance by non-family members

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Abstract

Focusing on the case of a successful French pharmaceutical family firm – VetCo, we develop a process model of family firm identity maintenance by non-family members. Being the first family-owned pharmaceutical actor exclusively dedicated to animal health worldwide, VetCo has a strong family firm identity. The maintenance of this identity is remarkable, as VetCo experienced a withdrawal of the owning family when its founder suddenly passed away and, later on, when other family members disengaged from operations. Using grounded theory, we build a process model of identity maintenance that emphasizes meaning multiplicity. Specifically, we identify three main mechanisms of meaning preservation – *passing on* the family legacy, *unifying* the metaphorical family, and *modeling* the family business – and two mechanisms of meaning connection – *holding* on and *bridging*. In elaborating theory on family firm identity maintenance, this study contributes to family business and organizational identity scholarships.

Introduction

> I don't know how it works in 250-year-old family firms. I don't know how VetCo will be in 15 or 30 years. I think that there is, however, a spirit in the company that perpetuates itself. (Interview with a non-family member)

Family Firm Identity (FFI), i.e., organizational members' shared understanding that, as a collective, they form a "family firm" (Gioia & Hamilton, 2017; Zellweger, Eddleston & Kellermanns, 2010), fosters employees' commitment and appeals to external stakeholders by inspiring trust (Eddleston, 2011), thus contributing to enhanced firm performance (Zellweger et al., 2010). Over time, like any organizational identity, the FFI may be diluted by looming identity threats (Petriglieri & Devine, 2016). In family firms, threats may surface during transmission, growth, or professionalization (Gersick, McCollom-Hampton & Lansberg, 1997). Yet the continuous maintenance of FFI to counter these dilution threats has remained largely underexplored.

Family business scholars emphasize the key role of family members in shaping the FFI (Dalpiaz, Tracey & Phillips, 2014; Zellweger et al., 2010) and organizational identity scholars suggest that identity understandings are influenced by managers' sensegiving (Corley & Gioia, 2004). Thus, as the proportion of family managers wanes or as family members opt out of operational management to focus on ownership and governance, FFI maintenance becomes more challenging: the sensegiving activities of the family decrease and the weight of FFI maintenance shifts to the Non-Family Members (NFMs). Given the pivotal role of FFI in firm performance, and the fact that family members' claims alone may not secure its preservation in the face of dilution threats, understanding how NFMs continuously maintain the FFI is a timely endeavor.

Two streams of research – family business and organizational identity – inform parts of this question without answering it fully. Family business scholars have not addressed the ongoing maintenance of FFI. Indeed, in line with the social actor perspective that dominates the field, they view FFI as a given and taken-for-granted fact, resting mainly on family members' claims (Boers 2013). Consequently, these scholars' focus has been on the efforts of family members to preserve a FFI while remaining oblivious to the important role NFMs may play in identity maintenance (Tabor, Chrisman, Madison & Vardaman, 2018).

In contrast, organizational identity scholars in the social-constructionist perspective have suggested that it is important to look beyond leaders' claims because identity is made up of the shared meanings continuously constructed by organizational members. Yet, with a dominant focus on change efforts (e.g., Brown, 2015; Corley & Gioia, 2004), organizational identity scholars have only begun to explore issues of identity maintenance (Anteby & Molnar, 2012). Some emphasize the persistence of a single shared-meaning system (e.g., Corley & Gioia, 2004), while others focus equally on organizational members' understandings and stress the constant struggle between competing meaning systems (e.g., Brown, 2015). With only partial theoretical insights into the puzzle of FFI ongoing maintenance by NFMs, we raise the following research question: *How do NFMs maintain a FFI – an understanding that they form, as a collective, a 'family firm'?*

We explore this question through an inductive qualitative case study of a French family firm, VetCo. VetCo is the first independent pharmaceutical laboratory exclusively dedicated to animal health worldwide, and attributes part of this success to its FFI. However, VetCo weathered the premature death of its founder and the withdrawal of family members from operations. It is thus a revelatory case for studying FFI maintenance by NFMs: With the family no longer operationally involved, VetCo heavily relies on NFMs to maintain this identity.

Our paper contributes to both family business and organizational identity scholarships. By adopting a social-constructionist approach to FFI that contrasts with the dominant social actor view in the field (Boers, 2013), we contribute to the family business literature. Indeed, we conceptualize the complexity of FFI meanings by surfacing the process through which a FFI can be preserved over time as these various meanings become interconnected. We also shed light on NFMs as crucial contributors to FFI maintenance, thus nuancing the role played by family members (Zellweger et al., 2010). Second, our work contributes to the social-constructionist tradition in organizational identity by explaining how multiple meanings may actually foster, rather than hinder, identity maintenance. Whereas prior research has either emphasized the prevalence of a single meaning system in organizational identity maintenance (Gioia, Nag & Corley, 2012) or focused on the fragmented nature of organizational identities (Brown & Humphrey, 2006), our model highlights the critical interactions of multiple (as opposed to single) and harmonious (as opposed to contested) meanings to maintain an organizational identity.

Literature Review

The literatures on family business and organizational identity hold complementary pieces of the puzzle of FFI maintenance by NFMs. The family business literature points to the importance of FFI in firm performance, and has begun to uncover multiple meanings attached to the FFI. Yet, the dominant, overwhelmingly static, taken-for-granted view of FFI centers on family members' claims and not on FFI's underlying meanings and maintenance by NFMs. In contrast, the organizational identity literature – especially its social-constructionist perspective – addresses identity maintenance, though it does not fully account for the harmonious maintenance of multiple meanings over time.

Family Firm Identity and family business studies

Building on the foundational definition by Zellweger et al. (2010), most family business scholars have portrayed FFI as family members' claims that "we are a family firm." Their approach is marked by what identity scholars call a "social actor" view (Boers, 2013). This view conceives of FFI as a source for categorization that emphasizes family firms' distinctiveness from non-family businesses. Indeed, such an essentialist view of identity is "particularly useful for scholars categorizing or comparing different types of organizations" as well as studying its impact on organizational outcomes (Whetten, Foreman & Dyer, 2014, p. 483). For example, research has shown that projecting a FFI can contribute to firm performance (Zellweger, Kellermanns, Eddleston & Memili, 2012). Internally, this projection helps create a rallying cry for employees (Zellweger et al., 2010) and/or fosters good practices, such as ethical decision-making (Dyer & Whetten, 2006). Externally, it is associated with positive attributes such as trustworthiness, quality, and loyalty, thereby enhancing relations with customers and suppliers (Taguiri & Davis, 1996; Zellweger et al., 2012). As the family personifies the business, it also makes the firm unique and recognizable (Zellweger et al., 2010). Finally, through their FFI, family firms benefit from community-level social capital since these entities tend to help each other (Eddleston, 2011).

While insightful, this dominant focus on identity claims as antecedents to organizational outcomes has prevented this body of work from capturing the dynamics at stake in identity construction and from examining the meanings that underlie a FFI (Boers, 2013; Ravasi & Canato, 2013): claiming to be a family firm is enough to be categorized as having a FFI, thereby making further inquiry superfluous. However, a handful of studies adopting an interpretative stance suggests that there may be multiple understandings associated with a FFI. They point to the family legacy (Dalpiaz et al., 2014), the metaphorical family (Ainsworth & Cox, 2003; Haugh & Mckee, 2003), or the family business by opposition to non-family businesses (Zellweger et al., 2010). While these studies focus on one of these meanings, only a few acknowledge the co-existence of multiple meanings, and do so only incidentally while tending to mix them. For instance, Zellweger et al. (2010) define the FFI via the distinction between family and non-family businesses, but they also hint at the existence of alternative meanings such as the metaphorical "family of employees" (p. 60) in firms like Southwest Airlines, as well as a "shared family name, common history" (p. 58) reminiscent of the family legacy. Brunninge and Melander (2013) distinguish the "specific FFI" as related to a particular family and its heritage and values, and the "general FFI," which contrasts the family firm from other businesses. Yet they also allude to "the family concept as a metaphor" (p. 15), subsuming it to the general FFI. Overall, these studies offer precious insights regarding the possibility that not one but multiple meanings may underlie the FFI. Still, some imprecisions and confusions prevent the emergence of a consistent overview. Another consequence of the predominant social actor view is that scholars have not explored how the FFI is maintained in an on-going fashion. Indeed, such studies consider the FFI as a given "social fact" because "organizations are literally what/who they claim to be" (Whetten et al., 2014, p. 483). In contrast, scholars adopting an interpretative approach have suggested that identity should be understood as an on-going process (Boers, 2013). They bring a few disparate clues regarding the dynamics of identity construction, such as the use of narratives (Dalpiaz et al., 2014) or the tensions family firms must face as they grow (Boers, 2013). However, these studies often concentrate on a restricted vantage point (e.g., mainly of leaders), which raises questions about *who* contributes to FFI maintenance.

Studies have overwhelmingly focused on family members' central position in producing identity claims, leaving the role of NFMs underexplored. For example, Zellweger and colleagues (2010) show under which conditions the family impacts the FFI (e.g., the degree

of family involvement, how the family perceives the firm), while Dalpiaz et al. (2014) focus on official autobiographies by family members. When research does take into account NFMs, it mostly centers on claims made by top management which overemphasizes a misleading homogeneity and yields little knowledge about the roles various NFMs may have in FFI maintenance. For instance, the "self-report identity" of Brunninge and Melander (2013, p. 4) does include claims by NFMs, but only from top management. Boers (2013) does interview a few trainees, but senior managers still represent the overwhelming majority of his sample. This focus on top management is symptomatic of a literature that has only recently started to acknowledge the general importance of NFMs in family firms (Tabor et al., 2018) with works on NFMs' commitment (Vallejo, 2009), psychological ownership (Sieger, Bernhard & Frey, 2011), and the specific difficulties NFMs may face, like feelings of unfairness (Barnett & Kellermans, 2006) or cultural competencies required in order to adapt to the family context (Hall & Nordqvist, 2008).

In sum, while the family business literature stresses the importance of FFI, NFMs' roles in its maintenance remain underexplored. The essentialist and static nature of identity offered by the social actor view pervades the field and makes it useful for categorizing family businesses. It is well-adapted for studying the impact of FFI on organizational outcomes such as social capital, reputation, and performance (Whetten et al., 2014). However, such a perspective tends to overlook the complexity of meanings underlying the family firm label and exclusively focuses on those who produce formal claims on behalf of the organization (i.e., leaders or family members) (Arrègle, Hitt, Sirmon & Very, 2007; Eddleston, 2011). In contrast, the social-constructionist perspective, with its emphasis on bottom-up sensemaking, is "particularly relevant when seeking to understand different conceptions of a single organization's identity" (Whetten et al., 2014, p. 483) because it integrates the on-going meaning construction of all organizational members. Following the calls by scholars to integrate these insights (Boers, 2013; Zellweger et al., 2010), we now turn to this perspective.

A social-constructionist perspective on organizational identity maintenance

In order to shed light on the meanings underlying the FFI, we adopt a social-constructionist perspective of organizational identity because it focuses on how individuals develop shared understandings (Haslam, Cornelissen & Werner, 2017). Thus, we define organizational identity as the "consensual understandings of organizational members about what it means to be 'who we are, as an organization'" (Gioia

& Hamilton, 2017, p. 25). In particular, within the social-constructionist perspective, we mainly draw from the "cognitive" tradition (Haslam et al., 2017, p. 321) which focuses on identity labels and the meanings organizational members attach to them. Concretely, organizational identity is associated with labels (e.g., "we are an innovative company"), and each label can hold different meanings in the life of an organization (e.g., "cutting-edge scientific research," "first to market") (Corley & Gioia, 2004) or among different organizational members (Sonenshein, 2010). Thus, organizational identity is considered an emergent outcome of organizational members' collective sensemaking.

Most of these studies on how organizational members develop collective understandings have, however, explored identity change (Clark, Gioia, Ketchen & Thomas 2010; Ravasi & Schulz, 2006), identity emergence (Corley & Gioia, 2004; Gioia, Price, Hamilton & Thomas, 2010), or identity responses in the face of disruptive events (Dutton & Dukerich, 1991). Thus, scholars have focused on what "it takes to create or change [organizational identities], not on what it takes for organizational identities to stay the same" (Anteby & Molnar, 2012, p. 516), leaving identity maintenance underexplored. Scholars in the cognitive social-constructionist tradition (e.g., Corley & Gioia, 2004; Gioia, Corley & Hamilton, 2013) consider that organizations mainly consist of a largely shared-meaning system (Spee & Jarzabkowski, 2017). Maintenance is thus portrayed as the preservation of a single shared-meaning system. Only one meaning corresponds to a particular identity label; e.g., the label "we are an innovative company" either means "we focus on cutting-edge scientific research" or "we are first to market" (Corley & Gioia, 2004). The co-existence of multiple meanings for the same label – referred to as "ambiguity" (Corley & Gioia, 2004) – is viewed as hampering maintenance and is associated to a transient state that surfaces only in times of change.

Indeed, ambiguity is desirable during organizational change because it plays two roles. First, it provides enough latitude of interpretation to satisfy all stakeholders because each can find a way to fit into the malleable identity (Clark et al., 2010; Corley & Gioia, 2004; Sonenshein, 2010); the label associated to an identity may remain the same, while the underlying meaning changes across time, which preserves continuity during the change (Gioia, Schultz & Corley, 2000). Second, ambiguity helps provoke a sense-breaking experience, a requisite for creating a state of destabilization that encourages disruptive change, which is then resolved by the sensegiving of leaders

(Corley & Gioia, 2004; Gioia et al., 2012). Once the change process is over, it leaves the stage to a newly-shared system of meanings, moving from one equilibrium to another. Gioia and colleagues (2012) even warn that maintaining an on-going state of ambiguity is a "dangerous game," as the end goal is to reach a "specific conclusion" (p. 8), i.e. a new coherent system of meanings.

While equally focusing on members' understandings, other scholars within the social-constructionist perspective – belonging to the "discursive" tradition (Haslam et al, 2017, p. 321), orient our attention to the fact that meaning multiplicity can be persistent. Yet, for these scholars, multiple meanings remain problematic for identity maintenance as they are associated with on-going conflicts between opposing parties who defend competing understandings. These authors emphasize fragmentation and contestation, and associate organizational identity maintenance with on-going tensions between hegemonic and resisting discourses (Brown & Humphreys, 2006; Humphreys & Brown, 2002). Despite their recognition that identity maintenance is equally problematic, these scholars' valuable insight is the attention cast on multiple organizational identity meanings brought by the notions of "polysemy" and "plurivocity." *Polysemy* refers to multiple and often competing meanings imbued with power dynamics. Humphrey and Brown (2002) stress how polysemy, or "the proliferation of socially uncontrolled meanings" accompanies the discordant voices that resist hegemonic meaning imposition (p. 425). *Plurivocity* recognizes that multiple communities of actors may hold different, often competing, understandings (Brown & Humphreys, 2003). Thus, the multiplicity of meanings – polysemy – is overwhelmingly associated with conflicting discourses and power dynamics – competitive plurivocity – which threatens a harmonious identity maintenance (Brown & Humphrey, 2006).

All in all, for a given label (e.g., "being a family firm"), the social-constructionist perspective views the harmonious maintenance of multiple meanings as problematic. In the social-constructionist tradition we draw from, multiplicity is associated with the transient state of change and represents a danger in the long-term as it prevents rallying around a clear vision. The discursive tradition, while equally focused on understandings, brings the valuable insight of attracting our attention to the possible persistence of multiple meanings. However, such multiplicity is systematically associated to conflicts between opposing parties.

Taken together, literatures on family business and organizational identity bring forth some insights about our research question on FFI maintenance by NFMs: they surface potential FFI meanings and the importance of multiple meanings. Yet, much remains unknown: family business scholarship has overlooked how FFI maintenance is achieved, as well as the role NFMs may play in it. Organizational identity scholars have not focused on organizational identity maintenance much beyond the fact that multiple meanings constitute a challenge to its persistence. We redress these shortcomings by building theory on how NFMs maintain an FFI.

Methods

VetCo, a growing family firm

VetCo constitutes a well-suited setting to investigate our research question. First, it fits Litz's (1995) definitional criteria of a "family firm" in that: (1) ownership and control are in the hands of the family who possesses 49.7% of the shares and 70% of the voting rights; (2) succession already occurred as the second generation ran VetCo after the founder (Dr. D.) died; (3) the family prepares transmission to the next generation; and, (4) family members define the firm as a "family firm." Second, VetCo is a family firm success story in which NFMs play a central role. Created in the late 60's, VetCo became the first family-owned pharmaceutical firm exclusively dedicated to animal health worldwide, and is in the top ten of its industry. At the time of our study, it was composed of 4,350 employees in 30 countries (with 1,200 employees in its headquarters in France where we conducted our study). Since its creation, and despite multiple evolutions, VetCo's FFI has remained strong, despite its founder's premature and unexpected death in 1992. Family members who subsequently took on the business opted out of operations in the early 2000's and focused on ownership and governance. At the same time, the exponential growth of VetCo led to the increasing importance of NFMs, thereby letting the maintenance of the FFI rest on their shoulders. In sum, VetCo, as a particularly successful family firm whose FFI maintenance relies heavily on NFMs, represents a strong case for our theory building. Indeed, single case studies based on "extreme exemplars" (De Massis & Kotlar, 2014, p.17) are more revelatory.

Data collection

To gain an in-depth understanding of the phenomenon, we conducted 47 semi-structured interviews (among 40 NFMs and 2 family members, with 1 family member and 4 NFMs interviewed twice) at VetCo's headquarters, totaling 76 hours of recording. To select our informants, we adopted a maximum variation sampling strategy to get the whole continuum of subjective experiences (Patton, 1990): we interviewed NFMs of every hierarchical level (from workers on production lines to the Chairman of the Managerial Board), among diverse services, and ranging in tenure from one to 43 years.

We also took field notes during one month of direct non-participant observation. Our notes related to three aspects: the organizational everyday life, the dynamics in different headquarters' units, and two major organizational events – an onboarding for newcomers and an annual information session intended to all headquarters' employees.

Finally, we examined archival data, including a book published for VetCo's 40th anniversary recounting its history, 17 issues of the VetCo staff quarterly magazine, transcriptions of official speeches given by family members at various occasions, annual reports, and other documents (e.g., HRM policies that reflected family values).

Data analysis

We employed grounded theory as it is particularly well-suited for understanding how actors construct meaning from their intersubjective experiences (Glaser & Strauss, 1967). First, we tried to stick as closely as possible to the informants' worldview, and thus engaged in open coding (Locke, 2001). This generated hundreds of provisional codes (e.g., "anecdote of founder shaking hands with everyone"). As we identified recurring patterns in the data, we moved from open to axial coding, and we came up with more and more encompassing and abstract codes (Locke, 2001). For example, our data revealed that NFMs develop three specific meanings attached to the "family firm" label: the family legacy, the metaphorical family, and the family business model. These meanings are preserved through various activities and sensemaking resources (first-order categories) that we regrouped in mechanisms (second-order themes) – respectively named *passing on*, *unifying*, and *modeling* – which we subsumed under the theoretical aggregate "meaning preservation mechanisms." This aggregate also includes another separate mechanism, *negating*, as our data also revealed that in some instances NFMs question

some of these meanings. We also realized that while NFMs ignored some meanings, they retain others, which we labeled *holding on*, and also combined them, which we referred to as *bridging*. Together, *holding* on and *bridging* form the "meaning connections mechanisms" aggregate. In an effort to understand how preservation mechanisms emerged, we coded mechanisms occurrence for each NFM which allowed for variation exploration within our sample. As VetCo's members, NFMs face the same "FFI threats" yet they display various "factors influencing individual threat sensitivity" and react differently; we regrouped these second-order themes under the aggregate "threat perceptions." This overall process led to what we labelled the "FFI maintenance" aggregate, characterized by the persistence of the FFI despite the threats and its anchoring through external recognition.

During this process, we progressively built and refined categories and constantly iterated between data and theory until we were able to theorize the studied phenomenon (Gioia, Corley & Hamilton, 2013). For instance, we found our observations resonated with Petriglieri and Devine (2016, p. 244) who explain that organizational members perceive and react to a threat if "something is personally at stake," which led us to develop the second order theme of "factors influencing individual threat sensitivity."

After we reached sufficient theorization, given the processual nature of our findings, we rearranged the aggregate theoretical dimensions into a process model of on-going FFI maintenance. NFMs continuously and iteratively go through the following four stages: in reaction to (I) threat perceptions, (II) meaning preservation mechanisms are activated, which leads to the upholding of multiple meanings that are combined through (III) meaning connection mechanisms, which ultimately leads to (IV) FFI maintenance.

Findings

The goal of our study is to understand how NFMs maintain a FFI – an understanding that they form, as a collective, a family firm. We uncover a process of on-going FFI maintenance (see Figure 1) composed of four stages that we detail in this section. While we present it in a linear fashion, the process enfolds iteratively: for organizational members, the FFI may be constantly challenged and requires continuous maintenance.

Table 1. Interview data supporting our model of FFI maintenance

Aggregates	Second-order themes	First-order categories	Representative examples of quotations
I. Threat perceptions	1. Threats to the FFI	A. Threat of the erosion of the Founder's values	• There are fewer and fewer people who have known the founder. This is because our teams have grown, they have been diluted; but, also because time passes. The firm was created 40 years ago, and the founder passed away 20 years ago. (MM, 1995) • In the next 5-10 years, I think everyone who has known Dr. D. will retire, so [when they leave VetCo] we will see if his values transmitted to the younger employees. (MM, 1998)
		B. Threat on the collective cohesion	• We feel a change; a more impersonal structure is growing. (O, 1990) • Today I no longer know all the people at the office. So, imagine how it is in the factories. When I joined the firm, I knew nearly all the people. (MM, 1982)
		C. Threat of heightened formalization	• As [VetCo] grew, we moved away from an informal firm based on individuals and networks… We thought that, given this growth, we needed more structure. (MM, 1990) • There have been more and more constraints everywhere; we have to more often abide by best practices, to processes. It's because of the evolution of the regulation, the market, the firm size, the shareholders also because we were not publicly traded in the beginning. (O, 1984)
	2. Factors influencing individual threat sensitivity	A. Identification to the Founder	• Dr. D. was a visionary and he inspired others. All the people who were around him were… they were like disciples; there was a strong commitment. He was like a guide; they were devoted to him. (MM, 1990). • Dr. D. was one of the most exceptional people I've met in my life. (MM, 1982)
		B. Identification to collectives	• [VetCo is] a company that works well, that has been existing for a long time, that is well established. It is *THE* [emphasis by the informant] company of the region. Everybody [in the region] dreams of working at VetCo. It is a firm that is moving forward, at the forefront of progress; a company that innovates, that makes investments. [...] I am proud to be in a firm that has this reputation, that moves forward, about which people talk, and that evolves in the right direction. (O, 1989) • The top management is lucid as well as humble. There is a strong pride and feeling of belonging, as well as a strong identity. (TM, 2005)

		C. Exposure to strategic thinking	• I experienced [working at a large corporation and a family business], and I know what makes the difference between the two. We are faster than large corporations. (TM, 1993) • In my previous job [at a large corporation], the CFO was not available to sign paperwork and it blocked the whole process. Having worked in various international firms, I can say that they don't know how to work in teams. (TM, 2006)
II. Meaning preservation mechanisms	3. *Passing on* : the firm as family legacy	A. Remembering the Founder	• With the old folks, we remember the old times when we were working with our boss, the Doctor. It's true that sometimes our hearts twitch when we think about him. (O, 1977) • We lived through some stories together. We had great fun with the girls talking about moments when we were scared because the former operation manager shouted at us, or when we were impressed by the Doctor. He was sometimes very impressive, I must say. (O, 1975)
		B. Acknowledging the Founder's family as custodians	• In a sense, Dr. D. is still there through his family. He was the one who built everything. If the family no longer ran the firm tomorrow, I would find it impersonal. I'm afraid that newcomers don't know this history, so it's important to remind them who the founder and his family are. I remember the Doctor; he always said hello to me when I bumped into him, even when I was new. (O, 1988) • The family is here behind us, and they sustain the image and iconic role of the founder. It is reassuring for employees and co-workers. We tell ourselves that in the end [the family members] are not just driven by finances. [Employees] are not considered short-term, and the deep emotional side of the company's beginnings lasts … and it sets the tone. (TM, 2002)
		C. Resources for *Passing on* provided by family members	• Tomorrow, the third generation, composed of nine children from four to 20 years old, will be there and ready to talk to you. You will see that each of them wants to contribute by telling the story of my father. (Speech by D1) • We have this beautiful company with great values. It's the main concern of the family: how to maintain this spark? […] Our father gave us the company's shares while he was still alive. He had a strong desire for continuation of his legacy. […] We'd like the firm to be inherited by the third generation so it keeps growing. (D1)
	4. *Unifying*: the firm as	A. Reaffirming the importance of the collective	• There is a family phenomenon. The number of weddings, of couples in the firm, it's crazy. These people met here at VetCo. It's incredible. (TM, 2006) • One morning I wanted to visit the sterilization unit in order to do an assessment. It was a surprise for the employees that I came to that floor. There are procedures;

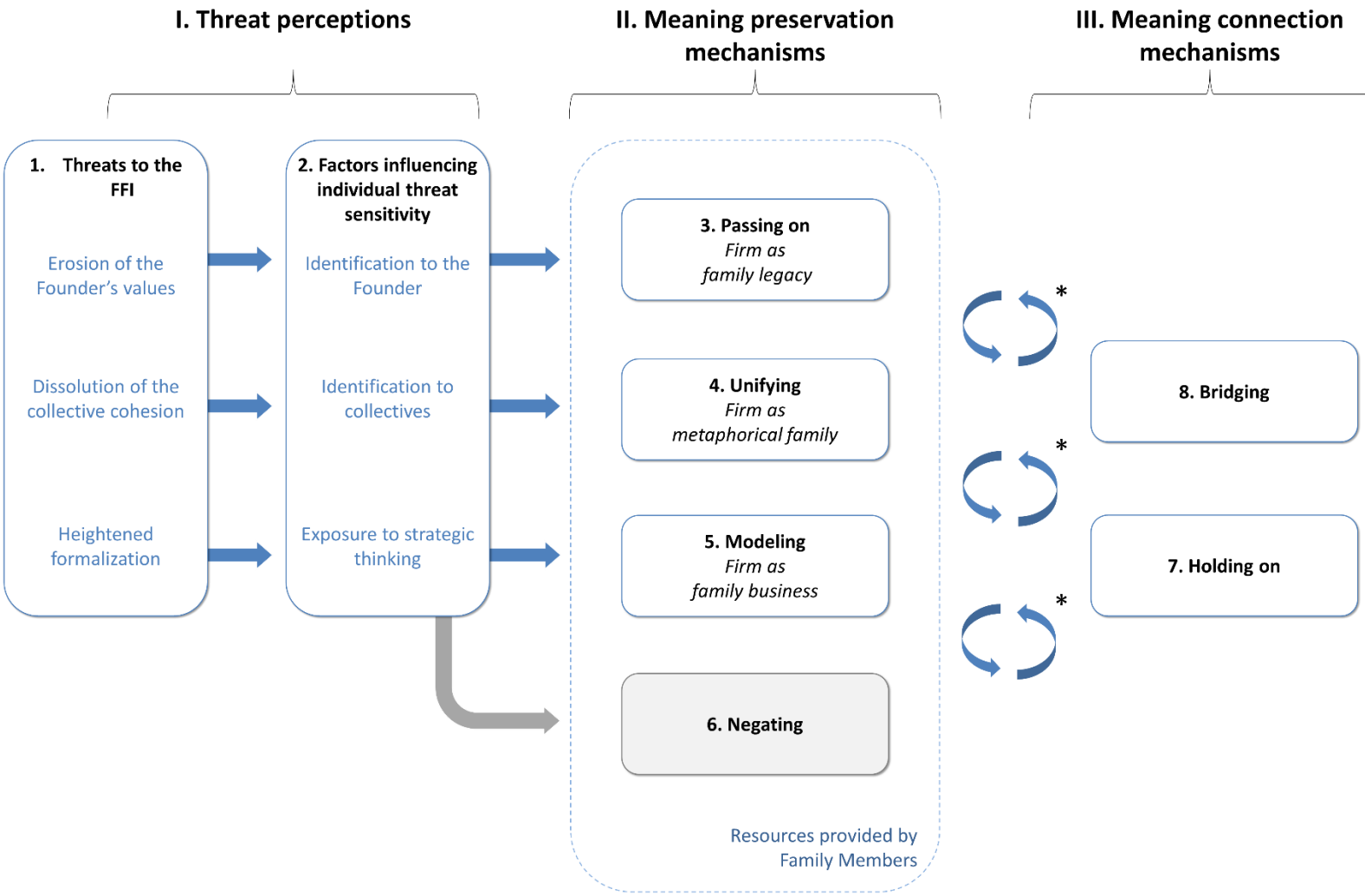
metaphorical family		you have to undress… we all have to do it. I found myself in my underwear side by side with the operator, in very close proximity. We all belong to the same family. We were able to identify the [assessment] issue. Everyone worked hard so we solved in five days what could have taken three months. We congratulated each other, we were heroes! (TM, 1990)
	B. Integrating new members	• Twice a year there are onboarding sessions for French and international newcomers. They are welcomed by everyone, and we all have a drink together. (TM, 2006) • I take care of newcomers as if I were their mother. When a young one comes, I try to give them my all. Of course, there are some procedures that are written. But the truth is, people don't know who they should talk to. I explain to them: if you need this, you have to ask Mr. So-and-So. I give them some tips so that [they] don't eat alone in the cafeteria. Many people do that, [we] older ones, but also the not-so-old ones because they were welcomed this way and do the same [for the newcomers] in return. (O, 1971)
	C. Resources for *Unifying* provided by family members	• D1's speech was revealing because she immediately stressed that her award was not for her but for all the employees who help build the firm. It was sincere, and reflects a particular state of mind. (TM, 1985) • It's with great pleasure, but also with a lot of emotion, that I speak for the first time to the whole VetCo family. I'd like to share my passion and speak to you with my heart. […] The great VetCo family is gathered here; our VetCo brothers and sisters from the whole world. VetCo is your firm! (Speech by D1)
5. *Modeling*: the firm as a family business	A. Contrasting with large corporations	• We lack ambition, but that's not a critique: we only take small risks. Big competitors like Pfizer – when they fail, it's a giant failure. (MM, 1998) • Large corporations are mainly guided by financial elements. This isn't the case here. Of course, it's important we get results, but given that we are a family firm, we stress longevity rather than winning in 'one shot'. (TM, 2002)
	B. Balancing old and new structural elements	• We are a family firm. There are advantages, such as long-term orientation and so on. At the same time, we are a publicly-traded firm. We are conditioned by the scrutiny of the markets and investors. It's a universal benchmark and we are happy with this. So, there are two world views: that of investors and IFRS, and that of the family. This mix of both is very powerful. (TM, 1984) • A jazz trio can improvise; it's flexible because it's small. If a symphonic orchestra tries, it doesn't work. It's like us. Volumes are increasing. The issue is to standardize our processes while staying flexible. (MM, 2006)

		C. Resources for *Modeling* provided by family members	• Worldwide we were the eighth lab to specialize in animal health, but the first family-owned independent lab. (Speech of D2) • VetCo is above all a family firm and we want to keep it this way. We are the world's first family-owned lab. (Speech of D1)
	6. *Negating* a meaning associated to the FFI	***A. Doubting one or several meanings of the FFI***	• People were more united. There is less conviviality now. Before, if we had nothing to do, we chatted and had fun with our colleagues. Now, people focus on their screen. Work relationships have becoming looser. (O, 1993) • If the firm were sold tomorrow, it would not be a big issue for me. (MM, 1993)
		B. Insufficient or misinterpreted resources provided by family members	• The family came for the 40th anniversary but that's all. Is the younger generation involved? The family has become so abstract. I don't know if they are still interested, or want to sell the firm. I've heard rumors. (O, 1990) • I don't know the family members; I have never eaten with them. I have no idea what they think. I don't know whether they are happy with the way we've progressed in the Southern Hemisphere… I don't know. (MM, 1993)
III. Meaning connection mechanisms	7. *Holding on*	A. Negating one meaning and holding on to another one	• When I joined VetCo we were using Excel spreadsheets; then we installed ERP and introduced processes and we started to work like a big firm. What makes me stay is that we have qualitative relationships. Even our partners are telling us that VetCo has a different feel [through] very close and warm relationships. (O, 1998) • No, in my daily life I don't feel the family dimension. […] But it's important that the family is still involved. If they sell, [VetCo] would be different. If the family sells Vetco one day, it will be a pity because it was Dr. D. who created this firm! (O, 1973)
		B. Ignoring one meaning and holding on to another one	• [What makes me stay at VetCo] is the remarkable quality of relationships […]: we have close and warm relationships […], and everyone says it's VetCo's strength. (O, 1998) [In the interview, the informant emphasizes the *metaphorical family*, but ignores the *family legacy* or the *family business model*.] • When there are skippering races, you can feel the cohesion. There are also parties for Christmas […] and before summer when we colleagues get together. (O, 2009) [In the interview, the informant emphasizes the *metaphorical family*, but ignores the *family legacy* or the *family business model*]
	8. *Bridging*	A. Examples of *Bridging* between the family legacy and the metaphorical family	• After a meeting at VetCo, we clean the room ourselves – we don't call the cleaning personnel. When we have meal trays, the CEO cleans his tray like anyone else, and this surprises the clients. In this spirit, we are used to sharing everything. It's typical VetCo style and it was inspired by Dr. D. (TM, 2006)

			• When Dr. D. passed away, it left a great void. People thought 'We lost our guide – what is going to happen?' And then a great uniting spirit overcame us: 'We're going to stick together, we're going to make it'. There was a great mobilization in the firm as people thought 'We are going to face this challenge together and succeed'. That was a turning point. The Doctor had been taking care of everyone. People took his legacy and multiplied it by ten in terms of team spirit and solidarity. (MM, 1990)
		B. Examples of *Bridging* between the metaphorical family and the family business model	• What characterizes VetCo is this sense of belonging which sets us apart from other firms. It's family firm. Everyone working at VetCo wants the firm to grow. We are very attached to the firm. The firm culture is such that if a worker wants to see the CEO, he can. This proximity, this ability to stay human… we aren't just a number on a page. Contrary to [names of large international competitors], we put people at the center of the firm. (MM, 1994) • A sense of belonging is shared among nearly all employees. Each of us authors a bit of the story. Each is a stakeholder, identifies with the firm, and is extremely committed. People often say we are different in respect to other organizations. It's our image. Our competitors are 10 to 50 times our size. We don't have organizational charts with functions, we have people with names. Also, we have a long-term vision, it makes our employees more confident. (TM, 1984)
		C. Examples of *Bridging* between the family legacy and the family business model	• The family carries weight, D1 and her husband above all. It's a firm they inherited from their father. They assigned themselves the mission to carry on their father's legacy. It's very strong. They are custodians. They are real family entrepreneurs, even if they are not the ones who founded the firm. They take risks. It's not like in large corporations where people spend hours to make a decision. (TM, 1993) • I worked in procurement at [name of multinational corporation] […] but there our choices were mainly guided by profits. Here we establish long-term relationships with suppliers. It's not only because we are a family business, but because this family is really involved. It's a family, but not any family; it's a committed and competent one. (TM, 1987)
IV. FFI Maintenance	9. Maintained FFI	A. Persistence of the FFI despite threats	• So despite the [firm's] evolutions, we are still of a mind that, to me, is in line with Dr. D. when he started. […] Despite the fact that all the tools we use have evolved, despite the fact that we grew, that the offices and work sites are dispersed, we did not become a machine wherein each of us is behind his/her computer. We still work through oral communication – at least as far as my team is concerned – and that's important; it needs to be preserved. (MM, 1988) • Our responsiveness is what makes us remarkable; because we were a small family firm, we were all working hard! And that sensibility remains! When I joined

	VetCo we used to go downstairs to help with the orders. And I feel that spirit is still here. (O, 1971)
B. Anchoring of the FFI through external recognition	• People [in the subsidiaries we buy] understand that we are a family firm with an entrepreneurial spirit. People feel it and accept it. People either feel comfortable at VetCo or they leave. […] Their integration depends on their ability to adopt our way of working, to understand it. Sometimes this was already the case in their firm, as in the example of the Chilean subsidiary; it was easy for that firm to integrate with [VetCo] because they were a family firm with entrepreneurs. (TM, 1993) • Because we are a family firm, we are very attractive to sellers. It's reassuring for them to know they found a buyer that will retain people and won't incite disruption. Contrary to large corporations, we don't think negatively of these people and will keep them. (TM, 1984)

Figure 1. A process model of FFI maintenance



*Curved arrows symbolize the constant interactions between meaning preservation and meaning connection mechanisms

I. Threat perceptions

Threats to the FFI

VetCo's employees portray a FFI that is exposed to various threats stemming from the evolution of the company and its environment, namely the erosion of the founder's values, the dissolution of the collective cohesion, and a heightened formalization. *First, the values of VetCo's charismatic founder, Dr. D. erode with time.* Upon his death in 1992, the founder left a considerable imprint and there are concerns about the disappearance of his values:

> Dr. D. hired and trained people without experience. In turn, they did the same, and so on. It led to a strong growth, but there is a loss in the DNA that is

> successively transmitted to new cells. The founder's DNA weakens. (MM, 1994)[1]

Second, as the firms grows, *the collective cohesion and the family-like relationships among employees risk being torn apart*. One NFM commented: "It's as if you were in a very small family and then there are many more people, and the distance also… To move from 40 to 2000 people, it changes quite a lot" (O, 1973). As the firm size increases, as new buildings emerge, the close bonds that existed between people are threatened by dissolution.

Finally, the firm's growth, increasingly stringent regulations in the pharmaceutical industry, and the need to meet the financial standards of a publicly traded corporation, *force VetCo to adopt more formalized processes*. However, heightened formalization, or the adoption of bureaucratic structures based on systematic rules and procedures, can hamper the entrepreneurial capabilities of family businesses and their well-adapted firm specific practices (Tabor et al., 2018). A manager commented:

> VetCo is moving from the spirit of a middle-sized firm to a large corporation with more processes [and] rationalization. (TM, 2006)

Formalization in family firms is commonly associated with a focus on short-term financial results because it structures the firm with the intent to meet heightened market pressure (Hall & Nordqvist, 2008). Such transformation threatens VetCo as a small, agile firm with typical organizational features specific to family businesses and dedicated to the pursuit of long-term goals.

Factors influencing individual threat sensitivity

While the threats to VetCo's FFI – erosion of the founder's values, dissolution of the collective cohesion, and heightened formalization – concern all NFMs, they are differently perceived by each individual; previous research shows that organizational members perceive a threat as more salient if it touches them personally, which in turn triggers a response (Petriglieri & Devine, 2016) – in our case, a meaning preservation mechanism. For the purpose of clarity, in this section we only focus on the factors that influence the NFMs' individual sensitivity to threats

[1] For each quote we indicate the informant's status (**TM**: **T**op **M**anagers; **MM**: **M**iddle **M**anagers; **O**: **O**thers – assistants, technicians, workers) and recruitment year.

(the mechanisms that are engaged in response to this threat perception will be described in the next section).

Our data suggest that *the erosion of the founder's values is particularly salient to NFMs who identify with him*. Dr. D. was admired religiously by some NFMs and seen as "incarnated God who knew everything" (TM, 1984). In our data, the numerous laudatory comments suggest that the identification was particularly strong for those NFMs who met him in person. For instance, a NFM who strongly identifies with the founder explains how the threat of the dilution of its legacy becomes prominent as time passes:

> I had the luck to know the Dr. D. He was a man whom we admired. […] Newcomers have not met the man! The old employees have met him, but most of them left. There may be fewer people who still understand Dr. D.'s spirit because there aren't that many who've known him. (O, 1973)

Conversely, NFMs who joined the firm after the founder's death tend to identify less with him. Yet, having met the founder is not a necessary condition for the cult-like admiration and, in some cases, identification even extends to people who joined well after his death:

> It's like Christ and his apostles. It's affective. We knew the founder and we live his values, in a personal capacity, every day. There are historical members but there are also people who have been here for five or ten years. It spans a wide range. (TM, 1980)

Second, our data reveal that *the threat of dissolution of the tight relationships is salient to NFMs who identify with collectives such as the whole company or organizational sub-groups*. Often, identification with VetCo as a collective is expressed by a strong sense of pride that is motivated by various reasons such as the nationality of the firm or its worldwide success. A NFM who identifies with VetCo explains her fear that tight social bonds, as in a family, could suffer as the firm grows:

> I'm very proud to say that I work in a French family firm. I did not join a multinational, I joined a small firm that grew and grew. When you join a small firm you know the people. As in a family, when facing hardships, people stick together. […] It would be a pity if the firm becomes impersonal. (O, 1971)

Interestingly, threat sensitivity also increases for NFMs who identify with organizational sub-groups: workers and technicians, who exhibit strong solidarity in the factories, or the top

management team, characterized by its "collegial spirit" (TM, 1984). In contrast, we observed that middle managers expressed less concern with regard to the threat of the dissolution of the collective cohesion. This could be explained by middle management lacking the sense of belonging that exists on factories' floors or within the very cohesive top management team, making thus the associated threat to group cohesion less relevant to them.

Finally, we observed that *the threat of heightened formalization is particularly salient to the NFMs who are familiar with strategic thinking.* This exposure to strategic thinking is predominant at higher hierarchical levels. Previous research suggests that in contrast to lower level employees who tend to focus on cultural elements, managers think about their firm in terms of strategy and compare their firms with rivals (Corley, 2004; Petriglieri & Devine, 2016). For instance, a manager explains how management is attentive to the issue of heightened formalization:

> We are paying attention in order to avoid becoming a big firm like Pfizer where you need 56 signatures before lifting a finger. For a long time VetCo was like David versus Goliath. Now, we sometimes come closer to Goliath, even if we are still far from it. (MM, 1995)

Our interviews suggest that in VetCo the top management is the most sensitive to this threat, with decreasing levels of sensitivity for middle management and lower level employees. Furthermore, the threat is particularly salient to NFMs who previously worked in multinational corporations. This is not surprising as some of them explicitly mentioned that the appeal of a smaller structure with "fewer routines" (TM, 2006) and "less red tape" (TM, 1999) counted among their motivations to join VetCo.

II. Meaning preservation mechanisms

In reaction to the threats to the FFI they perceive, NFMs activate and engage in different preservation mechanisms. For each mechanism, we describe two core activities, along with the sensemaking resources provided by family members that NFMs may draw on during these activities.

Passing on: The firm as family legacy. *Passing on* the family legacy is a mechanism that counters the threat of the erosion of the founder's legacy which is salient to NFMs who identify with him. First, *NFMs remember and share stories about the founder*, and hence maintain his legacy in the collective memory. For example, NFMs who worked with the founder share memories, thereby maintaining their common understanding of his personality and managerial vision. A top manager recalled:

> With [a colleague], we were remembering the other day how Dr. D. used to manage the business. This guy was impressive, we are still talking about him, […] his vision and way of working. (TM, 1980)

NFMs associate many of the values characterizing VetCo to the founder's personality, such as his entrepreneurial spirit, his commitment to the firm, his proximity with employees and customers, and his management style.

Stories are also shared beyond the initial circle of NFMs who directly interacted with family members. Our informants told us that NFMs who used to work closely with the founder share their experience with newcomers, helping them understand VetCo. This may explain why employees who have not known the founder may also pass on his legacy. One informant recalled that one foreign branch director:

> … never met Dr. D., but mentions his legacy in nearly all of his management meetings. He learned French, speaks French at the meetings, and often refers to Dr. D. He even uses sailing metaphors because Dr. D. was passionate about sailing. (O, 1982)

Second, NFMs also *recognize the founder's family as custodians in charge of passing on a legacy*. This informant underlined the role of the family in transmitting the legacy much like a sacred relic:

> My feeling is that the family wants to transmit a legacy. It's reassuring for us, the employees, to know that the family wants to pass on the [Holy] Grail. (TM, 2006)

Often, NFMs stress the affective connection between the family and the firm; NFMs qualify this relationship as "visceral" and believe that for family members, giving up the founder's spirit would be experienced as "a betrayal" (TM, 2002).

While engaging in these two passing on activities, NFMs may occasionally draw on *sensemaking resources provided by the family.* These resources are of two kinds. First, family members provide NFMs with ceremonial resources during occasional staged events such as rituals, official speeches, and celebrations. Staged events involving family members enable NFMs to either remember the founder or acknowledge the family implication within VetCo. For instance, during VetCo's 40th anniversary, D1[2] explained how the current generation "tries to pass on and share [the family's] values to the next generation." Children from the third generation retell the founder's story, illustrating the continuity of his legacy across time. The "Skippering Sessions" of S1 represent another important ritual seen as a manifestation of "filiation" (MM, 1993); S1 is passionate about sailing like was his father Dr. D., and is perceived as a courageous hero struggling against the elements, as how his father was seen as an intrepid entrepreneur. Second, family members offer NFMs casual sensemaking resources through spontaneous interactions such as conversations and behaviors. For instance, the family members' daily behaviors, albeit less visible to NFMs, reflect the values their father imprinted on VetCo. This alignment reinforces their legitimacy and hence their role as rightful legacy custodians in the eyes of the NFMs. As this informant recounted:

> Family members are Protestant, not in the religious sense, but in their attitude. At VetCo, we are puritans. If we have fireworks, it will be for the clients. These are the family values that they got from their father. […] They assign to themselves more duties than rights and it is perceived by the employees. (TM, 1980)

Overall, because they are not operationally involved, family members rarely intervene, but their interventions do have a strong symbolic weight for some NFMs. Yet our data suggest that the narratives about the founder and his family, spontaneously told and exchanged among NFMs and based on their own memories, form the core of their sensemaking. The sporadic but exceptional interventions of the family, in the form of highly ritualized events, reinforce this sensemaking by reviving these stories and adding new ones, thereby reloading the pool of symbolic resources (Howard-Grenville et al., 2013).

[2] We named the founder's two daughters "D1" and "D2," and two sons "S1" and "S2."

Unifying: the firm as metaphorical family. NFMs who engage in *unifying* counter the threat to the collective (characterized by family-like tight relationships) by maintaining the idea that the firm is a metaphorical family. First, they *reaffirm the importance of the collective using specific values*. The metaphorical family is expressed by our informants through the importance of values such as solidarity, team spirit, and equality, as well as the tight links between employees. This NFM explained how proximity between people remains an important factor of preserving a family atmosphere:

> What we did 20 years ago – organized meals, seminars – it was just at a smaller scale. Today, even if it's more challenging to keep the family climate, we still have the desire to maintain this proximity. I think we manage to keep this bond. (O, 1988)

The metaphorical family also manifests itself through "real" family relationships as NFMs mention the high number of weddings and babies among VetCo's employees (TM, 2006), or how family-related events, such as the adoption of a child, lead to mutual support among colleagues (O, 1988). Overall, most NFMs stressed the "solid and warm relationships" (TM, 2005) which permeate the organizational daily life, ranging from work relationships to numerous sport gatherings attended by VetCo employees.

Second, as VetCo grows, NFMs also stress *its ability to integrate new members*. However, the maintenance of a cohesive group is only made possible by a strict selection of who can join the "family" in terms of alignment with VetCo's values:

> We form a clan as there is a strong sense of belonging, but we are also very open and welcoming. We nonetheless have a tremendous ability to reject. A newcomer who cannot fit in within six months will be rejected, even if this person is a genius. It's like in families, either the in-laws are rejected as ugly ducklings, or they are accepted if they abide by the rules of the system. (TM, 1980)

Several NFMs used the "transplant" metaphor: a successful transplant leads to a full integration of the new elements into the organism, while a non-adaptation leads to a violent rejection.

Again, *sensemaking resources provided by family members may reinforce the NFMs unifying activities*. In our data, resources provided by the family for unifying were mostly provided through ceremonial events. The most striking example comes from D1's discourse at VetCo's 40th anniversary wherein the Firm was presented as the "VetCo family," reuniting all

employees, regardless of their position. The "Skippering Sessions" in which S1 defends VetCo's colors in an international race, also foster a great communion among NFMs because they share an emotional moment:

> We all gather in a room to talk to [S1]. There are over 250 people. […] Everybody listens, applauds, and screams. (TM, 2006)

The skippering ritual, which highlights the founder's son (S1), is a good example of a resource that can be used differently depending on the NFMs involved. Those who lay emphasis on the family legacy focus on the father-son filiation while others focus on the opportunity for bonding between employees as offered through the celebration.

Modeling: the firm as family business. NFMs engage in *modeling* to counter the threat of a heightened formalization. They consider VetCo a family firm because it exhibits the organizational features associated with a family business. First, *NFMs contrast the family business model against large corporations*. VetCo operates in a market dominated by large pharmaceutical groups. It has never been sold despite the difficulties it has faced. NFMs portray it as a strong entity that has always fought against larger competitors with less means, which represents another way to do business, typical for family businesses in general. To contrast VetCo with a large corporation, NFMs point out the reasonable, pragmatic behaviors of VetCo's members regarding money (as expressed in their regular use of the French expression "*Gérer en bon père de famille*" ["managing as a good father"]), which they juxtapose to those behaviors of large corporations, wherein they speak of "financial whims," "excessive and useless expenses," and "wastes" (TM, 1993). A second and related opposition to large corporations is the long-term horizon enabled by the family ownership. This represents a source of stability for NFMs in general, and managers more particularly, who can lead long-term projects without the pressures of short-term goals and profitability imposed by the market. As the same manager summarized: "What matters is the firm in 20 years" (TM, 1993).

Second, NFMs try to *balance old and new elements* by integrating elements of formalization in organizational structure and practices while preserving the specificities of a small, flexible organization. For instance, NFMs explain how "a bit more rigor in the processes" could complement VetCo's "oral tradition" (TM, 1980), or how "the standardization of ERP systems and computers" is implemented while "preserving the human and the roles of people" (TM, 1984). An informant sums up how a constant balance must be found:

> Large corporations are heavy, with many administrative processes, and this paralyses them. Our challenge is to move from the stage where we are small and reactive to a stage where we would be much bigger while keeping the features that contributed to our success. (TM, 2006)

As for other meaning preservation mechanisms, *the family provides supplementing sensemaking resources* that NFMs may draw on during their modeling activities. With regard to ceremonial resources, in speeches the family emphasizes that VetCo is a family-owned firm, and stresses its success when facing multinational competitors; family members also highlight the importance of thinking "in the long run" and "longevity" (D1's speech). Such messages remind NFMs of the idiosyncratic nature of their firm, especially its long-term orientation. These discourses also stress the necessity to strike a balance between the formalization linked to the pressure of the market while keeping the innovative mindset alive:

> We want to develop as fast as possible, while keeping our family dimension. We are faithful to our values […] such as our entrepreneurial spirit. (D1)

Second, NFMs pick up casual sensemaking resources when observing family members who are involved in the governance and witnessing their exemplary trust in the management. Such trust is reciprocal: the family draws attention to trust in our interviews, and top management mentions a "proximity, intimacy, a vital trust" between both parties (TM, 1984). Such a mutual feeling mitigates the need for formalization since goal alignment makes control based on strict procedures less necessary (Tabor et al., 2018).

Negating a meaning associated to the FFI. In some rare instances in our data, *NFMs doubted the existence of one or several meanings associated with the FFI* (the family legacy, the family metaphor, or the family business model). For example, some NFMs entertaining doubts on the family legacy consider that family members are not involved enough, as this informant explained:

> In our mind, it's not the family who manages VetCo […]. We know they are here, as majority shareholders, but they are invisible. It's not the same feeling as before. (O, 1984)

Similarly, some NFMs lamented that relationships have become too impersonal at VetCo for it to be considered a metaphorical family: "[in the past] the spirit was different, people knew each other's names, and there was more solidarity, but slowly, it disappeared" (O, 1990). Finally,

some NFMs questioned the family business nature of VetCo, stating that it no longer has a "family management style" (MM, 1982).

As we have shown, sensemaking resources provided by family members, whether they are ceremonial or casual, play a role in reinforcing and supplementing sensemaking by NFMs. Thus, *if these resources are insufficient or differently interpreted,* they sometimes contribute to NFMs negating a meaning associated with the FFI. For instance, an informant observed that the Skippering Sessions "are on the wane […] and the sense of belonging has disappeared" (MM, 1998). Indeed, as S1 was involved with his fourth race [at the time of our study], the adventurous spirit had apparently declined; those NFMs who did not know S1 as a child now do not have the same emotional connection to him vis-à-vis those NFMs who had known him since his youth. Another informant considers the Christmas Tree Celebration, an annual event at which family members give gifts to children of staff members (thereby potentially reinforcing both the legacy and the bonds of the metaphorical family), as a "waste of resources" (MM, 1993). Observing such divergent interpretations is not surprising: as shown, not all aspects of the FFI appeal to all NFMs. Furthermore, NFMs use the sensemaking resources provided by family members as they see fit. Still, even NFMs who question one of the meanings of the family firm can still contribute to FFI maintenance through the *holding on* mechanism we now examine.

III. Meaning connection mechanisms

Our findings reveal that NFMs do not focus on only one meaning; on the contrary, depending on their sensitivity to threats, they subsequently engage one or more of the meanings simultaneously and may connect them via one of two connection mechanisms: *holding on* or *bridging*.

Holding on. Some NFMs *may not agree with one meaning associated with the FFI* (negating a meaning associated with the FFI) or *simply ignore one meaning* (absence of meaning preservation). However, they still acknowledge VetCo's family-related nature by holding on to one of the other available meanings and, hence, contribute to FFI maintenance. For instance, this informant regrets the dissolution of the links of the metaphorical family but is reassured by the stability brought by the family:

> We share less and less. People who join now, they stay two years then leave […]. But there is still the impression that we are in a family firm; as long as there is

> the family, we have a form of security for the future. Yes, maybe the fact that we are still a family firm is salient with regard to this. (O, 1993)

In our data, only a minority of informants exhibits meaning preservation on all three meanings. Still, there is no doubt that for the majority of NFMs, and the observed consensus at a collective level, VetCo still is a family firm. This is due to NFMs instinctively falling back to one of the available meanings which helps maintain the FFI – only one informant did not engage in any meaning preservation about VetCo as a family firm.

Bridging. In their sensemaking, NFMs may unconsciously associate two or three meanings together. For instance, in the following example, the informant *associated the idea that VetCo is a metaphorical family (i.e., everyone shares a common goal) to the legacy* of the founder:

> Dr. D. instilled this family dimension: VetCo is our firm, everyone contributes and is important to reach our common objective. I'm very attached to my firm. Even more recent people feel it. (O, 1988)

Previous research has indeed shown that remembering, or "re-membering," can encourage unity and belonging to a collective (Suddaby, Foster & Quinn-Trank, 2016), and that sharing a common heritage encourages communality (Brown & Humphreys, 2002). Similarly, the emphasis on the care given to people – a characteristic of the family business model, as opposed to that of a large corporation – is sometimes associated to the idea of solidarity that must exist between members of the same metaphorical family. Finally, characteristics of family businesses in general, such as the economy of resources, are sometimes traced back by some informants to the founder whose legacy is passed on by his family. Sometimes even all three meanings are combined:

> We have people who are genetically entrepreneurs. We see that while we want to set up processes, the gene persists. Informality dominates; this is part of the genetic code of the people who constitute VetCo, and thus the genetic code of the Firm itself, which has been entrepreneurial for historical reasons. (TM, 2006)

This NFM combines the family legacy (the historical roots), the metaphorical family (the common genes, as among members of the same family), and the balance that needs to be reached between informality and structure by the family business model. In sum, *bridging*, via the creation of links between various meanings associated to the family firm, increases the consistency of the family firm label.

IV. FFI Maintenance

Maintained FFI. Ultimately, the combination of meaning preservation and meaning connection mechanisms leads to the maintenance of VetCo's FFI. This is supported by the fact that NFMs emphasize the persistence of the FFI despite the multiple threats accompanying its growth. Furthermore, the maintained FFI rests on a widely shared understanding that VetCo is acknowledged as a family firm by a broad audience, extending even to external stakeholders.

First, many informants stress *the persistence of VetCo as a family firm despite the threats it faces*. Research underlines the "resilience of shared understandings" in identity maintenance when facing obstacles (Ravasi & Schultz, 2006, p. 453). This emphasis on the resistance of the FFI is evoked through numerous mentions of its existence and continuity, accompanied by the threats that could hamper it. For instance, a NFM explains:

> For me, VetCo is *still* a family firm *despite* the importance it has taken, and *in spite* of all these things that happened [emphasis by the authors]. (O, 1977)

Second, our data suggest that NFMs *value the fact that external stakeholders regard VetCo as a family firm:* suppliers, customers, and strategic targets recognize the firm as a family one, thereby illustrating that its FFI is durably anchored. Outsiders' representations play a critical role in validating an organizational identity, especially when they provide distinctiveness in comparison to competitors (Ashforth et al., 2011; Gioia et al., 2000). A top manager recounted how acquisitions are facilitated through the recognition by potential targets that VetCo is a family firm:

> Often our acquisitions are family firms with a deceased father… the similarity helps. We are flexible and we scare them less because they know we will perpetuate how things work. We often acquire targets that were solicited by big competitors, and sometimes get them for less. (TM, 2006)

Discussion

Our study raises the question "*How do NFMs maintain a FFI – an understanding that they form, as a collective, a 'family firm?'*." We draw together our findings into the four-stage process model of on-going FFI maintenance by NFMs (Figure 1).

Our findings surface threats that are differently perceived by NFMs depending on factors influencing individual threat sensitivity (Stage I: threat perception). The perception of the threats then triggers non-exclusive mechanisms of meaning preservation (Stage II: meaning

preservation mechanisms), occasionally nourished by organizational resources for sensemaking provided by family members (Howard-Grenville et al., 2013; Schinoff et al., 2016). With ***passing on***, NFMs who identify with the founder and his family maintain the meaning of the firm as the *family legacy* (Brunninge & Melander, 2013; Dalpiaz et al., 2014), thereby preventing the erosion of the founder's and family's values. With ***unifying***, NFMs who identify with collectives such as VetCo or organizational sub-groups defend the meaning of the firm as a *metaphorical family* (Ainsworth & Cox, 2003), thereby preventing the dissolution of the collective. With ***modeling***, NFMs who are aware of strategic questions preserve the meaning of the firm as an evolving *family business* (Brunninge & Melander, 2013; Zellweger et al., 2010). In doing so, they prevent the excesses of over-formalization typical of large corporations. Our data also revealed another separate mechanism, namely ***negating***, when some NFMs do not acknowledge one or several of the meanings previously mentioned and disagree with them. The meaning connection mechanisms (Stage III) allow NFMs to strengthen the FFI in two ways: through ***holding on*** and ***bridging***. With *holding on*, NFMs who reject or ignore one of the meanings can still adhere to another one and thus contribute to FFI maintenance. With *bridging*, NFMs can combine meanings, which in turn reinforces the overall consistency of the family firm label. The constant interaction between meaning preservation mechanisms and meaning connection mechanisms is symbolized on Figure 1 by curved arrows. Together, these mechanisms enable NFMs to form a complex web of meanings that leads to a maintained FFI, characterized by its resilience and its widely shared status (Stage IV: FFI maintenance). Because of the ongoing nature of FFI maintenance, this whole process is iterative.

Contributions to the family business literature

By taking a social-constructionist approach to FFI that contrasts with the dominant social actor view in the field, we contribute to the family business literature as follows. First, we conceptualize the complexity of FFI meanings, offering an avenue by which to rethink current studies. Second, rather than considering FFI as taken-for-granted, our model uncovers the factors influencing threat sensitivity and triggering meaning preservation mechanisms, thereby stressing the ongoing and processual nature of FFI maintenance. Third, we shed light on NFMs as crucial actors, thus rethinking the roles played by NFMs and family members in FFI.

With *passing on the family legacy*, *unifying the metaphorical family,* and *modeling the family business,* our work shines light on the multiple meanings at the heart of FFI. As such, it aligns with the few studies that have hinted at or discussed these different components of the FFI (e.g., Ainsworth & Cox, 2003; Brunninge & Melander, 2013; Zellweger et al., 2010). Yet our work

explores in greater depth these meanings and their relations. We look at each meaning and identify the threats each counters, as well as explore the activities NFMs engage in to accordingly maintain the FFI. We also show how these meanings may be interrelated thanks to meaning connection mechanisms. The tight interrelation of those meanings – palpable in the *bridging* mechanism – also helps explain why previous research might have inadvertently fused together some of those meanings. Our work shifts the focus away from FFI as a category or social fact toward understanding "different conceptions of a single organization's identity" (Whetten et al., 2014, p. 483). Having these various FFI meanings in mind enables scholars to revisit the current literature with a more refined eye. For example, studies using FFI as an antecedent of outcomes could use our conceptualization of FFI to disentangle which meaning(s) lead(s) to which outcome(s). For instance, which FFI meanings exactly impact the creation of a strong social capital within family firms (Arrègle et al., 2007)? This impact might be lower when the family legacy is strong but the metaphorical family, which fosters tight relationships, is only lightly present.

By viewing FFI as a social fact (Whetten et al., 2014), previous research has overlooked the mundane and on-going efforts that maintenance entails (Anteby & Molnar, 2012). With its social-constructionist approach, our study uncovers an ongoing process model of FFI maintenance. Specifically, our findings reveal that three meaning preservation mechanisms are activated when NFMs perceive identity threats. Threat sensitivity depends on what personally touches organizational members (Petriglieri & Devine, 2016), and is tied to identification with the founder and his legacy, identification to collectives (firm or organizational subgroups), and exposure to strategic issues. Previous research has stressed the strength of family members' identification with the family firm in general (Sundaramurthy & Kreiner, 2008), as well as NFMs' commitment (Vallejo, 2009) and identification (Zellweger et al., 2010). However, prior work has not established any correspondence between these various forms of identification and the meanings supporting FFI maintenance – a deficit solved by our model. Furthermore, we show that strategic exposure is also a trigger for meaning preservation; this suggests that, beyond identification, there may be other activators of FFI maintenance remaining to be explored.

Another implication of our model is that it stresses the importance of NFMs in FFI maintenance. This has two consequences. First, we articulate sources of heterogeneity among NFMs with regard to FFI. Indeed, previous research has mostly portrayed NFMs as a rather homogeneous group by opposition to family members (Arrègle et al., 2007) and often reduced to non-family

top management and leaders (Tabor et al., 2018). By exploring all types of NFMs at VetCo, we identify factors influencing individual threat sensitivity and uncover complex patterns among NFMs with regard to who engage in which meaning preservation mechanism(s). For example, NFMs engage in *modeling* because of their exposure to strategic thinking, which increases with their hierarchical level. However, NFMs engage in *unifying* because of their identification to collectives, which, in our case, is both at the top (VetCo's cohesive top management) and at the bottom of the hierarchy (workers stick together on factory floors). In line with Tabor et al. (2018) who argue that "exploring the heterogeneity of nonfamily involvement will provide a finer grained understanding" (p. 18), our analysis uncovers a complex and refined picture that goes beyond traditional divides (e.g., employees *versus* management).

Second, by honing in on the role of NFMs, our study does not view sensegiving by family members as the main driving force of FFI maintenance. As such, our work departs from existing literature which have focused on the role of family members/founders as sole legitimate sensegivers for FFI (Boers, 2013; Boers & Ljungkvist, 2018; Brunninge & Melander, 2013; Dyer &Whetten, 2006; Zellweger et al., 2010). Still, in line with previous research (Boers, 2013, Brunninge & Melander, 2013; Zellweger et al., 2010), we recognize that family members do play a role in that they provide a "toolkit" (Swidler, 1986) of sensemaking resources available to NFMs (Dalpiaz et al., 2014) for *passing on*, *unifying*, *modeling*, and *negating*. These resources can be ceremonial events (e.g., rituals, speeches, and celebrations) or casual interactions (e.g., spontaneous conversations and observed behaviors when NFMs occasionally meet family members). In our case, ceremonial sensemaking resources are more predominant because family members are no longer involved in operations. Thus, casual interactions were rare or from a distant past when the founder and his family were still involved in operations. In particular, our study suggests that ceremonial staged events help regenerate the pool of symbolic resources (Howard-Grenville et al., 2013), by creating new stories and memories through rituals (e.g., firm anniversaries, skippering sessions with S1), for instance. Yet the same event (e.g., skippering sessions) can be used and interpreted differently depending on the meaning preservation mechanism(s) each NFM performs (e.g., S1 as a symbol of legacy or the NFMs' communion to emphasize the metaphorical family). It can even be sometimes misinterpreted in the sense that it does not lead to FFI maintenance. Overall, these findings invite the rethinking of the family's role in FFI maintenance. They suggest that the resources the family proposes should cover a wide spectrum of interpretations in order to accommodate the variety of NFMs.

Contributions to the organizational identity literature

Our primary contribution to the organizational identity literature lies in shedding light on the dynamic co-existence of multiple (versus single) and harmonious (versus contested) meanings. Whereas prior research has either emphasized the prevalence of a single meaning system in organizational identity maintenance (Gioia & Chittipeddi, 1991), or focused on the fragmented nature of organizational identities (Brown & Humphreys, 2006), our model highlights the critical interactions of multiple and shared meanings to maintain an organizational identity.

We contribute to the cognitive social-constructionist research stream by showing that a specific form of ambiguity is compatible with identity maintenance, whereas prior work has mainly considered maintenance as a stable state that cannot accommodate multiple meanings (Corley & Gioia, 2004 ; Gioia & Chittipeddi, 1991). Indeed, ambiguity can either refer to *polysemy* – the potentiality for multiple interpretations of a single label – or to *vagueness* – an imprecision in definition that may create a meaning void and a destabilization of organizational members (Gioia et al., 2012). In organizational change, which requires both latitude of interpretation and destabilization, both polysemy and vagueness have often been confounded. For instance, labels provided by managers can be polysemic (i.e., open to multiple interpretations and thus appealing to everyone) and vague (i.e., imprecise and thus destabilizing) at the same time (Clark et al. 2010). In contrast, identity maintenance requires interpretive leeway, but not destabilization because it is about meaning preservation. Here, ambiguity – as *polysemy* – provides enough flexibility for multiple interpretations as each NFM can "put his or her own interpretation […] in the context of personal experience" (Gioia et al., 2012, p. 6), the latter determining individual threat sensitivity in our case. At the same time, each meaning associated to the family firm label remains well defined. Without vagueness, organizational members are not destabilized or confused which is well adapted because identity maintenance is about preserving a focus and not embracing new paths (Corley & Gioia, 2004; Gioia et al., 2012). Furthermore, our study contrasts with previous works on change that stress how multiple meanings for the same label succeed one another across time (Gioia et al., 2000); we show how various meanings simultaneously coexist. This is encouraged by the connection mechanisms that increase the overall consistency required for a stable state of identity maintenance, which is characterized by a common meaning system (Gioia & Chittipeddi, 1991).

Contrary to what previous research suggests, by showing that ambiguity – as long as it takes the form of *polysemy* – has its place in identity maintenance, we follow Gioia's (1998) lead to link ambiguity to the complexity of addressing diverse audiences, but extend his insight from

change to identity maintenance. We thereby contribute to the idea that stability and change are intertwined (Gioia et al., 2013); as organizational identity is continuously maintained and dynamically reconstructed, it is plausible that some concepts only previously associated to disruptive identity change, such as ambiguity, play a role in identity maintenance. Through this contribution, we also invite scholars to take a closer look at the many forms ambiguity may take (Abdallah & Langley, 2014), and accordingly revisit existing works in light of these nuances.

Another insight brought about by our study is that in the absence of sense-breaking experience or meaning void (Corley & Gioia, 2004), NFMs are less guided by family members' claims than by their own perceptions of the environmental threat, so they then engage the resources provided by family members accordingly (Howard-Grenville et al., 2013). Thus, contrary to previous studies exploring sensegiving by leaders, our model emphasizes the role of threat perceptions (Petriglieri & Devine, 2016) in organizational identity maintenance, as well as the heterogeneous responses by organizational members, thereby shifting the focus from unicity (a system of meaning imposed by sensegivers) to multiplicity (the diverse understandings emerging from the individual threat sensitivities of various organizational members).

While the discursive social-constructionist tradition acknowledges the co-existence of multiple meanings in identity maintenance, our study suggests that the multiple meanings of the FFI (akin to polysemy as defined previously) complement rather than compete with one another (Brown & Humphreys, 2006; Humphreys & Brown, 2002). We show how coherence among multiple meanings is achieved via the connection mechanisms. While discordant voices still exist, as in the case of negating the FFI, they are not based on disagreements between members holding competing FFI meanings. We thereby recognize the active role of various organizational members to "formulate, edit, applaud, and refuse various elements" (He & Brown, 2013, p. 10) without associating this diversity to competition or contestation. Furthermore, in the discursive social-constructionist tradition, multiple meanings are traditionally associated to opposite interests (Brown & Humphreys, 2006). Typically, managers push a dominant narrative that is against plurality, while other organizational members resist this narrative (Humphrey & Brown, 2002). In contrast, the different meanings we identify can be constructed by the same individual and do not represent an opposition of vested interests. Thus, we dissociate polysemy from competitive plurivocity. In sum, by stressing the breadth and richness of identity contents that employees may develop around a single label, such as the family firm, we show how multiplicity can appear even in the absence of conflicting sides.

All in all, both cognitive and discursive streams assume that multiple meanings are incompatible with the stability and harmony of identity maintenance. In contrast, we show that multiple meanings – in the form of polysemy – are beneficial and may even be necessary for identity maintenance. As we have shown, such difference is explained by the distinctions on which we focus, such as the nuance between polysemy and vagueness, as well as the dissociation of polysemy from competitive plurivocity.

Transferability to other family firms and boundary conditions

Many single case studies stress their transferability to other settings (e.g., Corley & Gioia, 2004), and we believe our model of FFI maintenance can provide insights for the majority of family firms. Many family businesses face the challenges of succession, growth, and professionalization (Gersick et al., 1997). Thus, the threats of erosion of the family legacy, dissolution of social ties, heightened formalization, and how NFMs counter these threats as they engage in FFI maintenance are theoretically transferable to other family firms.

Our model does not claim that all family firms develop and preserve all three meanings, nor that all mechanisms are necessary to build a FFI. Rather, it explains the possible meanings associated with the FFI that can surface in family firms and how and why these meanings are maintained. For instance, a firm could maintain a FFI based only on its relation to the family legacy (e.g., Dalpiaz et al., 2014) if its NFMs identify to the family. While our model is not meant to be exhaustive in capturing all the possible meanings associated with any FFI, the fact that it covers all the FFI components brought by the existing literature (Ainsworth & Cox, 2003; Boers, 2013; Brunninge & Melander, 2013; Whetten et al., 2014; Zellweger et al., 2010) suggests that it is relatively encompassing.

One important caveat is that our model assumes that the FFI maintenance is warranted by those who perceive the FFI positively. This is not always the case, and organizational members may acknowledge the existence of a FFI while rejecting it. Families can sometimes be "liabilities" (Zellweger et al., 2010, p. 55), in which cases NFMs could reject the family legacy. The metaphorical family can be felt as a repressive and paternalistic disciplinary device (Ainsworth & Cox, 2003). Likewise, the family business model can be rebuffed if considered as "resistant to change, stagnant, inefficient" (Zellweger et al., 2010, p. 61). In contrast with few of our informants who rejected thinking of VetCo as a family firm, such cases tend to involve NFMs who do think they form a family firm but reject this identity. In this scenario, other mechanisms, such as disidentification, might be involved, which could be explored in future research.

Our research also has practical implications. Family firms constitute the majority of companies worldwide (La Porta, Lopez-De-Silanes, & Shleifer, 1999) and the FFI is considered a central asset, reinforcing the familiness of a company (Zellweger et al., 2010). Leaders and family members should attempt to offer adequate symbolic resources (e.g., rituals) in order to encourage and reinforce sensemaking by NFMs. These family leaders should also tune in and be sensitive to the wide range of meanings continuously constructed by a whole spectrum of organizational members, and try to adapt to them without imposing inadequate sensegiving that could otherwise be perceived as artificial or oppressive. A metaphorical family would not align with a negative work climate in the same way as the family legacy would not work if the family's ethical behaviors had been questioned in the past.

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