# The Role of Analogy and Metaphor in the Framing and Legitimization of Strategic Change

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## Abstract
Strategic change initiatives disrupt established categories of stakeholder understanding and typically present a problem of justifying and legitimizing the change to stakeholders in order to gain their buy-in and support. While it has been suggested that the analogical or metaphorical framing of strategic changes is crucial in that it fosters understanding and creates legitimacy for the change, we set out to specify the conditions and uses of analogical and metaphorical framing in effecting support for strategic changes. Specifically, we argue that (a) analogies are more effective in the context of additive changes, whereas metaphors are more apt for substitutive changes, and that (b) relational analogies and metaphors are generally more effective in securing support for strategic changes, as opposed to analogies or metaphors that highlight common attributes. We also argue that the overall effectiveness of analogies and metaphors in the framing of a change is furthermore dependent on (c) the degree to which these frames are culturally familiar to stakeholders and (d) the extent to which they connect with the prior motivations of stakeholders.

## Keywords
analogy, framing, institutionalization, metaphor, strategic change, strategy

The topic of strategic change, defined as "a redefinition of the organization's mission and purpose or a substantial shift in overall priorities and goals" (Gioia, Thomas, Clark & Chittipeddi, 1994: 364), has been central to a growing literature in the strategy and organizational fields (e.g. Corley & Gioia, 2004; Fiss & Zajac, 2006; Kaplan, 2008; Sonenshein, 2006). An important point of attention

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across these literatures has been the framing and communication of a strategic change to stakeholders in an attempt to gain their acceptance and support. Since strategic change often disrupts the status quo and previously established categories of understanding, it may trigger controversy and confusion with internal and external stakeholder groups and thus almost always presents a problem of justification and legitimization. Much past and recent research has accordingly focused on symbolic framing processes that aim to create comprehension and gain stakeholder acceptance for a strategic change (e.g. Gioia et al., 1994; Kaplan, 2008; Nutt, 1998; Oliver, 1991; Zajac & Westphal, 1995). Framing suggests that specific change agents, such as leaders or managers of an organization, may evoke in their communications (e.g. speeches, conversations and reports) certain frames that connect with or bridge categories of understanding (Goffman, 1974) as a way of fostering understanding and creating legitimacy for a change.

In the present paper, we start from this basic insight and develop a set of propositions regarding the effective framing of strategic changes that specify how and when linguistically articulated frames not only create cognitive understanding but may also resonate with broader value orientations in society (Lounsbury & Glynn, 2001; Snow & Benford, 1988). Importantly, on the basis of such resonance, the proposed strategic change may be judged as "natural" or even as "taken-for-granted" (Douglas, 1986; Suchman, 1995), as an important condition for the change to become legitimized with stakeholders. Traditionally, strategy and institutional scholars have intuitively appreciated this crucial aspect of framing, and, as part of that insight, have highlighted the role of analogical and metaphorical reasoning in particular. Douglas (1986) for example argued that the framing of changes or novel conventions such as new organizational forms or practices (see also Cornelissen & Clarke, 2010; Etzion & Ferraro, 2010) is usually made to be understood and taken for granted on the back of a "naturalizing analogy"; or a drawn literal comparison to another domain of understanding. In the same year and informed by Lakoff and Johnson (1980), Gioia (1986) developed his original ideas on the importance of metaphor (figurative comparisons with superficially dissimilar concepts) as a form of sense making and giving around strategic change. Gioia subsequently wrote a series of articles on a strategic change at a public university (e.g. Gioia, 1986; Gioia & Chittipeddi, 1991; Gioia et al., 1994) where the incoming university president had used a range of metaphorical phrases and idioms to direct senior members of the university and other stakeholders in their own interpretations and ways of implementing the change.

Ever since, strategy and institutional scholars (e.g. Cornelissen & Clarke, 2010; Cornelissen, 2011; Etzion & Ferraro, 2010; Hargadon & Douglas, 2001; Suddaby & Greenwood, 2005) have intimated that (a) the framing of strategic changes is crucial to foster understanding and to gain legitimacy for a change, and (b) that frames are likely to create legitimacy by analogically or metaphorically connoting and then accommodating existing cultural schemas of understanding. However, besides these broad insights, there is very little theoretical detail on the scope conditions, processes and outcomes associated with the use of analogies or metaphors in the framing of a strategic change. In other words, the research question guiding our efforts is: when and how are analogies, or alternatively metaphors, effective in framing a strategic change and in securing initial support and legitimacy for a change? In this paper, we define the focal constructs of analogy and metaphor in framing processes and theorize about the conditions that are associated with the effective use of these forms of language use.

We first of all theorize about conditions associated with the nature of the strategic change; we specifically argue that analogical comparisons are more likely to be effective when the change is additive and can be framed as potentially contiguous with past, established practices that are familiar to stakeholders and mesh with their prior institutionalized categories of understanding (e.g. Fiss & Zajac, 2006). Metaphorical comparisons on the other hand are, we argue, more likely to be effective

when the proposed change is a break from the past (i.e. substitutive), leaving managers unconstrained by past commitments and able to draw wider metaphorical comparisons beyond their organization or industry that resonate with value orientations or social identities of stakeholders in an attempt to claim legitimacy for the change (e.g. Corley & Gioia, 2004; Rao, Monin & Durand, 2003; Weber, Heinze & DeSoucey, 2008).

A second set of arguments that we develop is that the effectiveness of analogies or metaphors varies. Our argument here is that analogies or metaphors that convey a system of connected counterparts and underlying causal relations are more likely to be judged as relevant and insightful of a particular change and are also more likely to be granted with legitimacy (e.g. Fauconnier & Turner, 2002). Gentner (1983), in her structure-mapping theory, emphasized the importance of relational or structural analogies and metaphors involving common causal structure between the source and the targeted change, in contrast to analogies and metaphors that are based on common attributes or superficial similarities (e.g. Tsoukas, 1993). In developing this argument, we aim to deepen theoretical understanding of the form of analogies or metaphors and its impact on securing comprehension and legitimacy for a strategic change. In doing so, we add to the current broad insights in the strategy and institutional literatures and offer a more specific set of theoretical predictions.

In the following sections of the paper we elaborate our specific arguments and advance a set of integrated propositions about the conditions under which the specific framing of a change is likely to be more or less effective. We begin by reviewing the relevant literature before we develop our arguments about variation in the framing of a strategic change as a basis for creating understanding and legitimacy. Throughout the paper, we buttress our arguments with examples of analogical and metaphorical framing drawn from existing strategy and institutional studies. The examples we use obviously do not provide exhaustive or inductive evidence in support of our arguments, but they do animate our theorizing and illustrate and highlight the fruitfulness of the lines of inquiry we suggest.

At the outset, it is important to emphasize that we restrict our focus to language as a primary site and medium for the framing and understanding of strategic changes, although we recognize that behavioral gestures, visuals and other modes of symbolization (see Bateson, 1955/1972) also signify or underpin acts of framing and meaning construction. A further boundary condition of our paper is that we restrict our scope to episodic processes of planned strategic change within a specific organization, rather than considering change as continuous and emergent (e.g. Huy, 2001). Finally, we also limit our focus to instances of strategic change where designated agents, as entrepreneurs, activists, leaders or managers, engage in conscious acts of framing towards primary or "salient" stakeholders whose support they seek (see Sonenshein, 2010). While strategic changes in an organization may in principle be of interest to, and indeed affect, multiple stakeholders, we assume that salient and dominant stakeholder groups (Mitchell, Agle & Wood, 1997) such as employees, investors, customers and suppliers will be more likely to directly engage with the change, and equally, given their prominence, managers in organizations will seek to secure their support for the change in question.

## Theoretical Background

The construct of "frame" and "framing" has been used over the years in various fields (e.g. Coulson, 2001; Tannen, 1979). Bateson introduced the basic idea in 1955 to explain how through signalling (e.g. gesturing or words) individuals evoke frames of interpretation for their behaviour or communicated messages. Bateson (1972: 186) insisted that a "frame" is cognitive in nature, but to characterize it, he used "the physical analogy of the picture frame and the more abstract…analogy of the mathematical set". That is, a frame first of all specifies the relationship between a number of connected and salient elements in a communicated message (i.e. a picture frame) on the basis of

which an issue or a topic may be defined and understood (Bateson, 1955/1972). So while, when we state or claim things, there is a manifest message with a specific content, there is, he argued, also the (implicit) frame that indicates how the message should be interpreted. This frame, in turn, is anchored in culturally shared, cognitive categories of understanding (i.e. the mathematical set) that guide and ground interpretation. In doing so, Bateson defined frames as a bridging concept between language, cognition and culture.

This orientation, however, was largely lost when the construct was elaborated and adopted in other disciplines, including sociology (e.g. Goffman, 1974), economics (e.g. Kahneman & Tversky, 1979) and social movements research (e.g. Snow & Benford, 1988). Crucially, it meant that the construct became aligned with disciplinary orientations. Minsky (1975, p. 212), for example, developed a strict cognitive psychological account of frames as "a data-structure for representing a stereotyped situation". In turn, Goffman (1974; 1981, p. 63) developed a sociological version of frames as culturally determined, familiar activities that are independent of any single individual; as he argued, "frames are a central part of a culture and are institutionalized in various ways". While these distinct cognitive and sociological versions of framing are useful for explaining how the making of meaning exhibits regularity, as Turner (2001, p. 145) argues, these have proved "nearly useless for explaining how a new schema can arise *before* it is manifest in our regular experience". The split between cognitive, discursive and sociological versions also disconnected language from cognition in processes of framing or simply assumed that a focus on the one would imply the other (Bateson, 1955/1972; Fillmore, 1982). As a result, the process of framing was often also conceptualized through a conduit lens, where any outcomes of meaning-making processes are already largely predetermined or given (Entman, 1993; Reddy, 1979).

To illustrate this point, research on organizational sensegiving and sensemaking conceptualizes framing as a pragmatic act of strategic persuasion, where individual managers, as skilled rhetoricians, are able to directly shape and direct the interpretations of stakeholders, by literally "giving" sense (Gioia & Chittipeddi, 1991) towards a preferred redefinition of reality (e.g. Corley & Gioia, 2004; Dutton & Ashford, 1993; Maitlis & Lawrence, 2007; Kaplan, 2008). Framing refers here to the (implicit) frame of understanding that is present in a manager's message with a specific content, although it is also assumed that almost automatically such messaging extends to the cognitive interpretations of recipients (Fiss & Zajac, 2006; Sonenshein, 2006). Frames themselves are, as a result, depicted as relatively stable modes of representation, grounded in cognitions and broader cultural belief systems, and which can simply be enlisted by managers as a salient and underlying "logic" in their communication in order to gain acceptance and support for an organizational change (Fiss & Zajac, 2006; Sonenshein, 2006). In the words of Oliver and Johnston (2000, p. 41), "the cultural beliefs of the targets of these efforts are viewed as relatively fixed, with framers merely putting the right 'spin' on the issue to tap into these fixed preconceptions".

The problematic nature of such linear assumptions is illustrated by longitudinal studies of the introduction, framing and implementation of strategic changes (e.g. Kaplan, 2008; Kellogg, 2009; Sonenshein, 2010; Suddaby & Greenwood, 2005; Zilber, 2002). For example, Zilber (2002) in a study of a rape crisis centre in Israel demonstrated how the appointment of therapeutically oriented people led to a gradual reframing of the purpose and meaning of the center. Zilber's study highlights the latitude and agency of individuals and groups in an organization, who do not simply synchronize frames or ideologies provided to them but also actively reframe the meaning of practices and any changes to the organization. Suddaby and Greenwood's (2005) study of the rhetorical struggles within the accounting and law professions over the formation of multidisciplinary partnerships goes one step further by highlighting the role of active framing contests. Proponents and opponents used analogical frames to promote or contest the change as a break from, or indeed as consistent with,

traditional practices and professional values. Suddaby and Greenwood (2005) also document how proponents and those overseeing the proposed changes, the US Securities and Exchange Commission (SEC), successfully managed to metaphorically frame the change as a new stage on the "historical path", as a "vision" of a dramatic change, and as a "revolution" brought about by historical and structural "forces". The key insight here is that, rather than framing the change as analogous with market developments in comparable industry settings or as consistent with past values, traditions and practices of law and accounting, proponents cleverly invoked in their framing a common cultural metaphorical understanding of honouring past traditions behind oneself, while being open to the future and its possibilities in front of oneself (Lakoff & Johnson, 1999). This framing, in turn, provided an important warrant for the legitimacy of the change and for the subsequent institutionalization of the new partnership form.

Besides highlighting the framing contests that leaders or managers and employees as well as other stakeholders may engage in, these prior studies also variably point to the role of analogies and metaphors in framing and securing support for a change. We pick up on this strand and, as mentioned, set out to develop specific predictions on how and when either analogies or metaphors are effective in securing support for a strategic change. Next, we first define the constructs of analogy and metaphor before we proceed with our more specific arguments.

## Analogies and Metaphors

In the 1970s, the linguist Charles Fillmore suggested that the framed meaning of many words relies on our experiences with the cultural scenarios and social institutions they presuppose. Analogous to Bateson's (1955/1972) analyses of frames as part of language use in specific cultures, Fillmore (1975, p. 124) defined a frame as a system of categories invoked by words and whose structure is rooted in some motivating cultural context. Words in turn are defined with respect to a frame and perform a categorization that takes the frame for granted. Hence, one way of formalizing acts of framing around strategic change in organizations is to consider it as a category inclusion process (Glucksberg, McGlone & Manfredi, 1997; Lakoff, 1987). When a change from the status quo is presented, it is rationalized and legitimized through inclusion in an extended or newly constructed category. The categories that are invoked in acts of framing could either be conventional and established or constructed in an ad hoc manner. A crucial way of invoking or constructing categories for novel instances such as a strategic change involves using analogical or metaphorical frames that can create or expand categories of understanding in order to incorporate the change. Consistent with writings in linguistic and cognitive science (e.g. Fauconnier & Turner, 1998; Gentner, Bowdle, Wolff & Boronat, 2001), we define analogies and metaphors as statements of similarity in properties or underlying relations between two specific domains. The difference between them is generally one of degree rather than kind (Gentner et al., 2001), with metaphors typically involving a more extended reach in terms of the domains of knowledge and language use connoted or drawn into the comparison and with analogies often used more specifically around the transference of causal structures. For our present purposes, we stick with the traditional distinction between analogies and metaphors as primarily resting on the domains that are drawn into the comparison (e.g. Gentner et al., 2001). Analogies, in the context of strategic change, involve references to cases and observations associated with past organizational strategies, general market or industry contexts, and business traditions and practices in general. An analogy thus conjoins cases from within the same domain of observations, which may involve the organization as well as the larger industry or environment in which it is located (e.g. Gavetti, 2011; Gavetti, Levinthal & Rivkin, 2005). Metaphors, on the other hand, refer to cross-categorical comparisons which accordingly appear figurative rather than literal

(Cornelissen, 2005; Lakoff, 1993). With metaphors a strategic change is likened to other cultural domains of experience outside a specific corporate or business context, such as, for example, warfare, sports or arts (e.g. Rao et al., 2003; Rindova, Becerra & Contardo, 2004).

Within acts of framing, analogies and metaphors – that is, verbally referring to other cases and domains of experience – can guide thinking and can create understanding and social acceptance. Leaders or managers may invoke analogical or metaphorical comparisons with other cases and experiences to familiarize themselves and others with a change, to reduce uncertainty and to support further inferences (e.g. Douglas, 1986; Etzion & Ferraro, 2010; Gioia et al., 1994). Analogies and metaphors are useful in the context of change because they "convey relationships to concepts already understood…[and hence] facilitate the construction of meaning by the person or group experiencing them" (Gioia, 1986, p. 53). As part of framing, analogies and metaphors provide structure, allowing members of an organization to comprehend the changing and unfamiliar situation (e.g. Gioia, 1986; Gioia et al., 1994), and also produce links to action by virtue of the inferences for action that they evoke (e.g. Cornelissen, 2011; Gioia, 1986; Weick, 1995). Besides structuring situations into an understandable format, analogies and metaphors also socially justify, or rather legitimize, decisions and actions to others (Creed, Langstraat & Scully, 2002) by validating some accounts and discrediting or pre-empting others (e.g. Cornelissen, 2011; Rindova et al., 2004; Weick et al., 2005). We define legitimacy in the context of strategic change as the immediate perception or active judgement of stakeholders of an organization that a particular change is desirable, proper or appropriate (Suchman, 1995: 574).

## Theorizing the Framing of Strategic Change

Studies of strategic change have traditionally explored whether changes made by organizations are ultimately beneficial to the organization, particularly in terms of how such changes are judged by parties in the internal and external environment. Classic formulations within population ecology and institutional theory suggested that changes that present a divergence or deviance away from conventional norms and understanding of the organizational form trigger sanctions by the environment (e.g. DiMaggio & Powell, 1983; Hannan & Freeman, 1989). In contrast, other studies have shown that even divergent organizational changes that break with norms and the status quo need not lead to negative outcomes (e.g. Durand, Rao & Monin, 2007; Kraatz & Zajac, 1996; Rao et al., 2003). To be sure, this conflicting picture of the effects of incremental or additive versus deviant or substitutive changes remains. In a recent set of studies on the change from haute to nouvelle cuisine, Rao et al. (2003) and Durand et al. (2007) demonstrate that those chefs who introduced changes but preserved the traditional template of haute cuisine fared well, as did those chefs who made the shift from "translators" to "creators" of a novel cuisine, transgressing established conventions of cooking and of using ingredients, and working with an open as opposed to a pre-set and largely formulaic menu. They document some differences in external evaluations based on the referent group against which a chef and their restaurant were judged (Durand et al., 2007) but, in the main, both types of change, which they labelled code-preserving code-violating, had positive effects on external evaluations. A similar finding arises in a longitudinal study of a Michelin-starred chef whose move from haute cuisine into vegetarian cuisine was legitimated by his assiduous attendance to, and respect for, the demands of the *Michelin Guide* (Gomez & Bouty, 2009). His careful and consistent use of metaphor, wherein he compared his new-found commitment to organic vegetables to an artist who works in watercolour and turns his hand to oils or to a sculptor in wood who changes to bronze, and the wider association of cooking and creative expression, provided the *Michelin Guide* with a legitimate basis to continue its high grading of the chef (Gomez & Bouty, 2009). These

competing predictions and findings, we suggest, point to the importance of framing, as mediating the effect of the actual scope and nature of the change on both internal and external evaluations. Indeed, the case documented by Rao et al. (2003) suggests as much; chefs who made small changes within the context of haute cuisine analogically framed the change as consistent with established traditions; on the other hand, chefs in the movement for nouvelle cuisine effectively used a metaphorical frame of artistic creation (Rao et al., 2003, p. 807) which resonated with a compatible change in logic in drama, literature and film in France at the time (the mid 1960s) and helped the activists acquire legitimacy and support for their actions.

The scope of strategic changes has often been labelled in different ways; as radical or incremental, as revolutionary or evolutionary, and as core or peripheral (e.g. Albert, 1992; D'Aunno, Succi & Alexander, 2000; Fox-Wolfgramm, Boal & Hunt, 1998; Greenwood & Hinings, 1996). Here, we define the scope of a change as the degree to which it involves an updating of an existing organizational template, with a new activity being added to or replacing the existing arrangement of core activities, or as a rewriting or reconstitution of the template in such a way that its core activities are supplanted. Following earlier literature, we label these changes as additive (i.e. an addition to the existing template) or as substitutive (i.e. a departure from, and substitution of, the existing template) (Albert, 1992; Corley & Gioia, 2004; D'Aunno et al., 2000; Durand et al., 2007). Following this distinction, we first of all argue that analogical comparisons are more likely to be effective when the change is additive and can as such be framed as potentially contiguous with past, established practices that are familiar to stakeholders and mesh with their prior categories of understanding (Fiss & Zajac, 2006). Fiss and Zajac (2006), for example, demonstrate how German corporations analogically framed and justified the change towards a shareholder orientation by setting it in the context of their past commitments towards all stakeholders and by constructing an inclusive category of "balancing stakeholder value", where the specific interests of shareholders are maximized in conjunction with creating value for employees, customers and other stakeholders (Fiss & Zajac, 2006). Metaphorical comparisons, on the other hand, are, we argue, more likely to be effective when the proposed change is a break from the past (i.e. substitutive), leaving managers unconstrained by past commitments and pressurized to draw wider metaphorical comparisons beyond their organization or industry that resonate with value orientations or social identities of stakeholders in an attempt to claim a rationale and basis of legitimacy for the change (e.g. Corley & Gioia, 2004; Rao et al., 2003; Weber et al., 2008). And while analogies and metaphors can of course be freely chosen by leaders or managers, we argue that their efforts are more likely to be rewarded when their choice is consistent with the scope of the change; that is, whether it is an additive or substitutive change.

> *Proposition 1: A strategic change is more likely to be considered as legitimate by stakeholders when the framing that is used is consistent with the scope of the change; additive changes are more likely to be effectively legitimized through an analogy-based framing, whereas substitutive changes are more likely to be effectively legitimized through a metaphorical framing.*

A second set of arguments that we develop relates to the form of the analogy or metaphor. While, as mentioned, leaders or managers are free to choose an analogy or metaphor as the source of their framing, there are important differences between the form of analogies and metaphors which, we argue, contributes to their effectiveness in framing a targeted change. In other words, not every analogy or metaphor can be expected to be equally successful in securing support for a strategic change. The body of research on analogies and metaphors in linguistics and cognitive science points in this respect to an important difference between "relational" or structural and "attribute" or superficial analogies and metaphors (e.g. Gentner, 1983; Gentner et al., 2001). To explain this difference it is worth drawing a first distinction between analogies and metaphors that simply involve matches

in isolated attributes, and ones that involve an elaborate web of counterpart connections with the targeted change that is being framed (e.g. Chiappe, Kennedy & Chiappe, 2003). The key point here is that, compared to analogies and metaphors that have only a few salient commonalities, those frames that are based on an extended web of counterparts will be more easily understood and are also more likely to be granted with legitimacy. For example, a metaphor such as "chefs as creators" (Rao et al., 2003) connects to multiple details of the targeted domain of change, including the roles of chefs, cooking techniques, menus and ingredients. The result of such a web of connections is that the metaphorical frame can be more easily understood, as a coherent representation, and can be elaborated with rich detail. In turn, such elaboration may also trigger emerging but frame-coherent inferences such as the fact that chefs should be allowed to develop '*nouvelle* cuisine' consistent with the role of being a creator. This example already illustrates that analogies or metaphors that convey a system of connected counterparts and with that underlying causal relations are judged to be more relevant and genuinely insightful (Fauconnier & Turner, 2002). Gentner (1983), in her structure-mapping theory, emphasizes the importance of relationships between counterpart connections and the underlying causality that is shared between the two inputs in an analogy or metaphor rather than simply common attributes or counterpart connections (Gentner et al., 2001; Tsoukas, 1993). In interpreting an analogy or metaphor people strive for a maximum structural match between a source and target by seeking a relational causal mapping. On this account the aptness and legitimacy of an analogy or metaphor is directly related to systematicity in the causal relationship between entities in the corresponding domains, i.e. agents, their activity and the environments in which they operate (e.g. Gentner et al., 2001), which in turn supports candidate inferences such as the notion of a "new" cuisine in the case of creative chefs. Alternatively, analogies or metaphors whose interpretation is largely based on non-relational properties, namely common labels or single attributes, tend to be judged as mere-appearance matches and are considered as less apt and revealing and hence also as less legitimate to the change at hand (Cornelissen, 2005; Tsoukas, 1993).

A good example of this general prediction is Greenberg's (1995) study of sensegiving and sense-making around a restructuring. She examines the initially innocuous managerial decision to divide teams of organizational members into "blue" and "grey" operational teams. The framing was simply meant to mark the separation of the teams, but Greenberg records how members started to unpack these labels in relational terms as analogously signifying the two sides in the American civil war. As such, they assigned roles and activities to each team, invoked managerial biases (following the historical record) and the teams in turn also became much more competitive towards one another. Greenberg's analysis demonstrates that, despite managerial intentions of simply labelling the teams with a particular attribute (colour), members of the organization strove to elaborate the presupposed underlying analogy, and completed this with an entire causal or relational structure of roles, actions and presupposed outcomes. While in this case the interpretations of members of the organization were unintended, the outcome of the case does underscore the main hypothesis – that is, individuals tend to prefer relational analogies and metaphors.

The observation that relational or structural analogies or metaphors fare relatively better in the framing of a strategic change is also supported by Kellogg's (2009) recent study of the introduction of new practices in two US hospitals. Her study demonstrates the framing contests between propo-nents and opponents of these reforms. Importantly, in one of the two hospitals, as Kellogg (2009) documents, the change practices were successfully implemented, while the proposed change failed in the other. The difference, according to Kellogg (2009), was the way in which proponents of the successful strategic change, including senior managers, constructed "relational frames" that accom-modated the legitimate concerns of opponents while demonstrating and justifying the efficacy of new task allocations and role behaviours. While the evidence is circumstantial, Kellogg's study does

present some preliminary support for our prediction. Finally, the writings of Mary Douglas (1986) can also be read to point to the importance of relational analogies or metaphors as the base on which a change is justified and achieves legitimacy. She famously argued that changes gain legitimacy on the back of a "naturalizing analogy": a drawn parallel or association with another taken-for-granted and "naturalized" cultural domain that legitimizes the change by demonstrating its "fit" with the "natural order". But she also argued that there are differences between strong parallels or associations in the form of an isomorphic causal structure with domains "found in the physical world, or in the supernatural world, or in eternity" and analogies and metaphors that are based on a more "socially contrived arrangement" (Douglas, 1986, p. 48). On the basis of such strong relational parallels, Douglas suggests, the analogy- or metaphor-based framing is more likely to be considered as apt and to secure legitimacy for the change. Following these arguments, we propose the following:

> Proposition 2: *A strategic change is more likely to be considered as legitimate by members of an organization when the framing that is used consists of relational as opposed to attribute analogies or metaphors*.

## Contexts of Framing

A further moderating condition worth considering is that specific analogies and metaphors that managers or leaders use, as part of their framing, can be familiar and conventional or wholly novel and creative in the context of their organizations (see Cornelissen & Clarke, 2010). Leaders or managers may simply extend conventional analogies or metaphors in their speech when they refer to the change situation as the target. Such conventional frames, which directly project and extend culturally familiar schemas of interpretation to the change, have significant advantages. They can help make a change appear familiar (Douglas, 1986; Lakoff & Johnson, 1980, 1999), reduce uncertainty and possible resistance in the process and, through a wider resonance with other cultural realms of experience, may also help legitimize the change. On the other hand, leaders or managers may also draw on novel and unprecedented analogical or metaphorical comparisons in relation to a change situation (see Cornelissen & Clarke, 2010). This involves instances of creative language use where leaders or managers discursively frame the change through novel analogies or metaphors that, despite their aptness, are to a lesser extent familiar to others in an organization. While such novel analogies or metaphors may be fitting and possibly elaborated with rich detail, the lack of familiarity may affect the degree to which they are comprehended and found legitimate by others.

We define culture as the stock of knowledge, beliefs and conventions shared by a particular group of people at a particular point in time (Swidler, 1986). Within an organizational context, individuals may share knowledge and beliefs in relation to their work and work practices, but equally may individually and collectively be aware of, and actively relate to, higher-order cognitive and symbolic conventions shared with others at the level of a society (Swidler, 1986; Weber et al., 2008). This cultural layering implies that leaders or managers can draw upon a whole range of cultural discourses and beliefs within and outside their organizations which effectively comprise a toolkit of available cultural elements for their framing efforts (Swidler, 1986; Weber et al., 2008). However, the familiarity of these cultural elements to individuals in an organization, ranging from the unfamiliar to a taken-for-granted "fact" of social life (Berger & Luckmann, 1967, pp. 58–9), is an important moderator of the effectiveness of any framing efforts. The underlying explanation here is that the familiarity of the source domain of the analogy or metaphor is able to confer legitimacy on a proposed change.

To illustrate, the Global Reporting Initiative (GRI), a venture around sustainability reporting, was initially set up in 1997 by its founders in the US as a bold vision of an environmental reporting

framework that they would, metaphorically speaking, "position" at the "heart" of the sustainability debate. Their intent was to develop a framework and practical guidelines for companies to voluntarily report on their environmental performance, thus revealing their contribution to the sustainability of the economy and society. It metaphorically represented, as they often repeated, "only one piece of what we must do to find our way to a healthy and sustainable future, but it is a necessary piece. Without it, we will never bring all the forms of capital – natural, human, and financial – into healthy alignment". Initially, the US market was unreceptive to the framework, which prompted the founders "to look beyond the borders of the US" and develop a "global" reporting initiative. They meant that the initiative metaphorically had to "cross borders" to gain physical "support" as a voluntary but "generally accepted" framework by multiple stakeholders (including companies) across the world. Hence, the Global Reporting Initiative (GRI) was initially metaphorically envisioned as a vehicle for "positioning" businesses across the globe at the "heart" of the sustainability debate. When the GRI was relaunched globally, after a dismal start in the US, the entrepreneurs reframed their communication around a strong analogical link between environmental reporting and the taken-for-granted practice of financial reporting. Etzion and Ferraro (2010) demonstrate how, because of their familiarity, the analogical parallels that were drawn in the communication strategy about the novel venture helped in assuring audiences of its feasibility and legitimacy. The analogy also specifically suggested that, based upon the recognized need in the business community for sustainability reporting (similar to the methods and standards of financial reporting), there will be demand for a reporting protocol that in its scope and principles is as rigorous as financial reporting. The key point for our argument here is that the initial metaphorical framing around spatial metaphors (position, global, pieces) and in relation to the sustainability debate did not resonate with stakeholders in the business community, possibly because they were not familiar with that debate nor the currency of these metaphors. The strong analogical link that was presented with financial reporting, on the other hand, provided the necessary understanding and legitimacy, and enabled the change with broad support and with the necessary basis for the practice to institutionalize.

> *Proposition 3: The relationship between the framing of a strategic change and its perceived legitimacy is moderated by the cultural familiarity of the frame; such that the ascribed legitimacy is higher when a frame is culturally familiar and taken-for-granted, and lower when a frame is less familiar or not even known to stakeholders.*

We already mentioned that framing in and around organizations may not follow a linear conduit model of communication in which attempts at framing almost automatically extend into stakeholder interpretations or sensemaking surrounding a strategic change (Reddy, 1979). The underlying epistemology of such a model is one that presupposes meaning construction as an uncomplicated process of sending and receiving messages, where any outcomes of meaning-making processes are already predetermined or given. This kind of circularity, however, underplays degrees of agency that people have in meaning construction (e.g. Sonenshein, 2010; Suddaby & Greenwood, 2005) and it also cannot account for how individual stakeholders of an organization not only synchronize frames provided to them within a particular context, but may also creatively blend or reformulate ideas to give meaning to their circumstances (e.g. Steinberg, 1998, 1999; Suddaby & Greenwood, 2005).

In line with a number of prior studies on framing in organizations (e.g. Kaplan, 2008; Kellogg, 2009; Sonenshein, 2006, 2010; Zilber, 2002), we equally do not assume that specific framing practices and any specific analogies or metaphors that are being used *direct* individual interpretations and the degree to which individuals consider the change as legitimate. Strategic changes, particularly ones that are complex and contested, are subject to multiple interpretations. However, at the same

time, it is feasible to assume (as a less strong position) that activated metaphorical or analogical associations may shape and influence interpretations and perceptions of legitimacy when it links a given motive to attitudes towards a change (see Landau, Sullivan & Greenberg, 2009). Part of what makes this a possibility is experimental evidence which suggests that analogical and metaphorical framing strongly influences how people respond to persuasive messages (e.g. Landau et al., 2009) and in turn draw inferences about social and organizational situations (e.g. Morris, Sheldon, Ames & Young, 2007). Landau et al. (2009; Landau, Meier & Keefer, 2010) empirically demonstrate that this effect is most pronounced in cases where metaphors connect with prior motives of audiences, for example in terms of their initial motives to resist or support a change. Motives are defined here as interests or beliefs that individuals have in relation to their organization.

Sonenshein (2010) recently illustrated the same effect in his study where he demonstrated that individual interpretations of an organizational change in a large retailing firm were affected by managerial framings of the change (in terms of specific change narratives) but were also largely dependent on whether individuals were in the first place motivated to accept the change as necessary and as essentially an improvement or regression. The important point here is that the interactive effect of motivation and framing in directing individual interpretation and attitudes is specific to a motive-relevant framing, and may not directly arise from the framing itself (as the conduit model would suggest) (Landau et al., 2009, 2010). Stakeholders may be divided on the change itself and may as such engage in framing contests and with their interpretations initially being at odds with one another (e.g. Kellogg, 2009; Suddaby & Greenwood, 2005). In such circumstances, the overall opinion on the change may not be swayed by a particular analogical or metaphorical framing. Indeed, stakeholders may themselves provide alternative framings and interpretations of the change (see Brummans et al., 2008).

However, when over time, and possibly as a result of such contests, motives and framing come into alignment – as empirically demonstrated by Kellogg (2009), Sonenshein (2010) and Suddaby and Greenwood (2005) – the framing may shape and influence interpretation in frame-coherent ways, in turn mediating the degree to which the change will be considered as legitimate. Each of the mentioned empirical studies does not necessarily suggest that a particular framing won out over others (see also Brummans et al., 2008), but instead points to ways in which frames connected with prior motives. It also seems, based on the available evidence in these studies, that the persistent use of a particular framing may in turn have strengthened the salience of a related motive – for example, the motive of being open to the development of a new organizational form (Suddaby & Greenwood, 2005) – which again confirms the interactive effect associated with the alignment of motives and frames. As such, we propose the following:

> *Proposition 4: The degree to which the framing of a strategic change is associated with frame-coherent judgements of the change as legitimate is mediated by the prior and salient motives of stakeholders; such that the ascribed legitimacy is higher (or lower) when a frame connects (or not) with such motives.*

## Discussion

While strategic change has been a central topic in strategy and institutional analyses, prior research has documented conflicting results on the evaluation of changes that organizations make and attempt to legitimize to stakeholders (e.g. Durand et al., 2007; Kraatz & Zajac, 1996; Rao et al., 2003). We used this conflicting picture as our starting point and complement and extend this line of inquiry by highlighting and theorizing the importance of conscious framing efforts by individual agents,

such as entrepreneurs, leaders or managers, as an important mechanism by which additive or substitutive changes become legitimized. In developing our propositions, we concentrated on the use of analogies or metaphors, as core processes of framing, given their recognized use in making changes appear familiar and legitimate in the eyes of stakeholder groups (e.g. Douglas, 1986; Gioia et al., 1994). Building on prior research on framing and on the roles and effects of analogies and metaphors (e.g. Cornelissen, 2011; Cornelissen & Clarke, 2010; Etzion & Ferraro, 2010; Hargadon & Douglas, 2001; Kellogg, 2009; Suddaby & Greenwood, 2005; Zilber, 2002), we developed a set of propositions that aim to explain how and when an analogy- or metaphor-based framing of a change is likely to secure support and legitimacy from stakeholders.

These propositions, we believe, extend strategy research on the framing of changes or strategic initiatives (e.g. Fiss & Zajac, 2006; Gioia & Chittipeddi, 1991; Gioia et al., 1994; Kaplan, 2008; Maitlis & Lawrence, 2007; Sonenshein, 2006, 2010) and their persuasive effects. Much research in this tradition (e.g. Gioia & Chittipeddi, 1991) assumes, as mentioned, a direct link between the framing (or sensegiving) of managers and the comprehension and evaluations (or sensemaking) of receiving stakeholders. The explanations for these persuasive effects, however, are often implied – for example, in references to the "discursive ability" of leaders or managers (Maitlis & Lawrence, 2007) and their ability to connect with explicit public expectations (Sonenshein, 2006) – rather than directly theorized. We add to this tradition by suggesting that the persuasiveness of a frame, in terms of it being comprehended and accepted as legitimate, depends on the degree to which it cues a schema or category of understanding that at the same time captures salient and related aspects of the change and is also culturally familiar to stakeholders. We also argued that the influence of such frames in directing interpretations depends on the extent to which to such frames connect with the prior motivations of stakeholders. Theorized in this way, we offer an important set of mediating and moderating conditions that explain the link between expressed frames (by managers) and stakeholder comprehension and acceptance of those frames, as an important basis for their support of the change.

Further, in developing our propositions we also connect with theory and research on cultural and institutional dynamics. The propositions specifically highlight how the content and structure of frames connect with, and shape, the institutionalization process and how entrepreneurs, managers or leaders, through framed analogical or metaphorical associations and arguments, are able to claim and establish shared understanding, support and legitimacy for their strategic changes (e.g. Douglas, 1986; Suddaby, 2010; Weber & Glynn, 2006). These kinds of associations and arguments, as we have demonstrated, analogically connect to past traditions and practices in business and industry settings but may also involve metaphorical comparisons that resonate with other cultural domains of knowledge and experience as a way of gaining legitimacy for the change (Cornelissen & Clarke, 2010; Douglas, 1986; Etzion & Ferraro, 2010). By focusing on analogical and metaphorical associations and arguments, that imply processes of (re)categorization, we are able to specify how communicated frames may evoke both continuity and change and may present coherent and culturally familiar categorizations of a change. As such, we also extend the work of Suddaby and Greenwood (2005) and Green (2004) by theorizing the manner in which metaphors and analogies might work rhetorically in making effective appeals in persuading others of the viability and cogency of strategic change. Furthermore, we argue that the use and effectiveness of analogies and metaphors is constrained and, in the first instance, dependent on their consistency with the actual scope of the change. Analogical frames, we argued, are effective in the context of additive changes, where changes are added to the status quo and traditional set of practices, whereas metaphorical frames are effective in the context of substitutive changes that supplant organizational arrangements as well as previous categories of stakeholder understanding.

While we have outlined basic arguments that help predict and explain the role and effectiveness of framing in securing initial support and legitimacy for strategic changes, there is much empirical

work to be done. Some of this work may directly draw on our predictions. In addition, further work may also expand beyond the scope restrictions of our arguments and propositions. For example, in developing our propositions, we restricted our scope to episodic changes in and around specific organizations. The efficacy of the framing of changes across institutional fields and in more complex institutional and stakeholder environments is worth investigating. For example, where there are variable and ambiguous norms and conventions in organizations' wider institutional environment, this may provide leeway to leaders or managers in negotiating a frame but it may also pressure them to accommodate competing logics – for example, by suggesting that a variety of outside expectations are analogous to, and conform to, organizational objectives behind the change (e.g. Boltanski & Thévenot, 2006). A key question here would be to what extent leaders or managers settle on and use a single analogy or metaphor, as the core of their framing efforts (Douglas, 1986; Etzion & Ferraro, 2010), or whether they will constantly switch between or blend multiple analogies and metaphors together in diverse and multistakeholder environments (Patriotta, Gond & Schultz, 2011).

Additionally, in developing our arguments and propositions, we focused on the role and effectiveness of framing in the initial stages of gaining support and legitimacy for a change. As such, we restricted our scope to the formative stages around announcing and implementing a change, which signals the opportunity of extending our arguments into studying the institutionalization of changes over time. Specifically, once a framing of a change has been talked into existence and has gained some initial legitimacy, it may be worthwhile to explore how and when such frames acquire cognitive legitimacy and become fully naturalized and taken-for-granted in a particular social setting, whether that is a specific organization, or even, beyond that, a field of organizations. To date, there has been very little theorizing on how analogically or metaphorically initiated frames may acquire such cognitive legitimacy and furthermore how, over time, such frames may themselves move from being analogical or metaphorical connotations, or parallels, to fully naturalized and taken-for-granted categories of understanding in an organization, or even in an organizational field (Douglas, 1986; Etzion & Ferraro, 2010). Overall, these restrictions of scope that are tied into our theory-building efforts only reinforce the need to test and possibly extend the theoretical propositions in various public and private domains and to study how broader cultural frames and categories of understanding may be enlisted, analogically or metaphorically, to frame strategic changes and to gain legitimacy and support for such changes.

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