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The Dynamics of Identity, Identity Work and Identity Formation in the Family Business: Insights from Identity Process Theory and Transformative Learning

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Introduction

In family business research, issues of identity and identity construction have become an increasing focus of attention, in terms of the conflict between organisational, family and individual identity; the identity shift or threat posed by intergenerational relationships and succession; and the tensions between traditional patrimonial family business leadership and gender-equality ideologies. Building on prior research (Leitch and Harrison 2017; Harrison and Leitch 2015, 2017), we identify three gaps in the literature on identity in the family business: first, identity is treated for the most part as an entity to which can be attributed individual and family business outcomes; second, the nature of leadership and leadership development in the family business has received scant attention, particularly as it relates to identity formation; and third, the nature of the identity work undertaken to create and maintain identity in the family business context in particular has been ignored.

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In this chapter, therefore, we develop a new perspective on leadership and identity in the family business by drawing on three wider literatures. First, we draw on identity process theory as a dynamic model of how individuals define, construct and modify their identities, particularly but not exclusively under conditions of radical change or threat. Second, we draw on recent reinterpretations of transformative learning theory, originally developed in the context of adult learning, as a psycho-social process fundamentally oriented to catalysing a change in identity. Third, as part of a wider discussion of leadership and leader development, we draw on recent work in the leader development literature that seeks enhanced understanding of the process underpinning identity construction, as represented in the identity work construct.

We extend these literatures and apply identity process theory, transformative learning and identity work to demonstrate how the leader of a first- to second-generation transitioning family business in a traditional masculinist manufacturing sector constructs her identity in the face of significant identity threats personally and organisationally. Using a single, longitudinal case, we illustrate the interconnectedness between the leader's identity, her various lived and ongoing experiences, current context and enactment of her leadership. We conclude that identity work is an implicit, continuous and negotiated process between self and others. This is contrary to much of the contemporary identity literature which views identity as real and stable and identity work as necessarily purposive (Leitch and Harrison 2017). Based on both our theoretical discussion and empirical case analysis, we make a contribution to family business research by demonstrating the applicability of identity process theory as a framework for identity research in family business, and of transformative learning as an approach to family business leadership development and as both a coping strategy and an identity workplace in the face of significant identity threats.

Identity and the Family Business: An Identity Process Theory Perspective

Family business research is characterised by two features that increasingly constrain the development of the field. First, and notwithstanding the attention given to, for example, socio-emotional wealth, intergenerational conflict and succession planning, it emphasises first and foremost the business and places less attention on the family aspect of family business (James et al. 2012; Rosa et al. 2014; Bettinelli et al. 2014). Second, it is for the most part reliant implicitly or explicitly on the Western model of the conjugal nuclear family, a

model which is not and never has been universal (Cherlin 2012) and which was already in decline in the West by the time Goode's book extolling its virtues, world revolution and family patterns, had been published in the 1960s (Cigoli and Scabini 2006). Both of these characteristics reflect a limited engagement by family business scholars with the wider family sociology and family psychology literatures (Jaskiewicz and Dyer 2017).

Building on previous research on discursive psychology and identity formation in the family business (Harrison and Leitch 2015), this chapter uses the shifting nature of the 'family' as the context for an investigation of the nature of identity and how it is developed and maintained in the family business context. As a starting point, research into the heterogeneity of the family business must recognise the underlying heterogeneity of the family itself, not just the availability of alternative literatures, such as 'family science' (Jaskiewicz et al. 2016). This heterogeneity includes: recognition of the non-conjugal, non-nuclear family model characteristic outside the West (Cherlin 2012); the growth of 'non-traditional' families as gender fluidity and the recognition of same-sex relationships increases (Rambukkana 2015; Cahill 2012); the influence of increased longevity on family dynamics, notably intergenerational relationships (Bengtson 2001); the influence of migration and the development of transnational families (Lersch 2016); changes in work-life relationships as the 'family economy' evolves and the boundaries between work and family shift (Poelmans et al. 2013); the emergence of alternatives to the traditional patrimonial model, including copreneuring (Helmle et al. 2011), father-daughter succession (Halkins et al. 2016) and woman-led family businesses (Brush et al. 2006); and the wider implications of increased gender equality for both family and business roles in the family business (Yang 2013). As in small business and entrepreneurship research more generally (Harrison et al. 2015), there is a pressing need in family business studies to take gender, and the identity issues it raises, more seriously (Mulholland 2003). In so doing it will be necessary to address the argument that rather than leading to a happy ending and the establishment of a new model of the family, gender-egalitarian ideologies remain the prerogative of the well-off and highly educated (The Conversation 2016), emphasising the importance of addressing the intersectionalities of gender, education, class and ethnicity in future family business research.

Our argument is that against this background of the shifting nature of 'the family', renewed attention must be given to understanding how identity emerges and is shaped in the family business. Much of the research in the field to date comes from an organisational identity perspective, largely on the argument that "the concepts of organizational and hybrid identity organizations … are highly

relevant for family business scholarship… [as] … a coherent framework for understanding this type of organization as an amalgam of equally important social forms" (Whetton et al. 2014: 481). Specifically, the focus of much of this research is on the distinctiveness of the "family business system" and its meta-identity that can account for aspects of performance and behaviour (Zellweger et al. 2010; Shepherd and Haynie 2009; Knapp et al. 2013; Whetton and Mackey 2002). This perspective has recently been challenged (Harrison and Leitch 2015) on the basis, first, that it conflates individual and organisational identity by viewing the business as a de facto extension of the (founder) entrepreneur (Powell and Baker 2013), and second, that it downplays the extent to which identity is a process rather than an entity (Gioia et al. 2013).

Here we extend this process perspective of family business and entrepreneurial identity as the dynamic outcome of the interplay of the individual and the social (Leitch and Harrison 2016, 2017; Harrison and Leitch 2015, 2017; Leitch et al. 2016). This highlights two key features of contemporary research on family business and entrepreneurial identity. First, it views identity as a dynamic rather than a (relatively) fixed and unchanging feature, shaped by different life episodes. It is increasingly fluid, multilevel and multidimensional, comprising multiple subidentities rather than a univocal (and unchanging) self. As such, it has a profound effect not only on the way we feel, think and behave but also on what we aim to achieve. Accordingly, it is vital that its dynamics are better understood, particularly in determining how actors behave in an increasingly heterogeneous family business context. Second, it focuses attention on identity work as the process through which family business and entrepreneurial identities are formed and shaped, and how the dynamics of identity formation relate to entrepreneurial outcomes in a range of individual and organisational contexts.

We adopt the definition of identity (in identity process theory) as a dynamic social product of the interaction of the capacities for memory, consciousness and organised construal with the physical and societal structures and influence processes which constitute the social context (Jaspal and Breakwell 2014). In other words, identity resides in psychological processes but is manifested through thought, action and affect: it is a process located in the core of the individual and yet also in the core of their communal culture, a communal culture which in the case of the family business has a complex dynamic in the interplay between family and business. In applying insights from family sociology and psychology to identity formation in the family business, we build on recent processual arguments that identity arises from the three processes of identity formation, identity activation and resultant behaviour (Bothma et al. 2015). As such, identities, in the family/business as

elsewhere, provide a meaning-making anchor: choices (decisions, outcomes) are identity-based and identity-congruent, and identities are, therefore, the traits and characteristics, social relations, roles and social groups that define who one is. In this respect, they are orienting, they provide a meaning-making lens and focus one's attention on some but not other features of the immediate context.

Breakwell's (1986) original account of identity process theory identified four 'identity principles': continuity across time and situation (continuity) (Wiggins 2001), uniqueness or distinctiveness from others (distinctiveness) (Vignoles et al. 2000), feeling confident and in control of one's life as a defining feature of identity (Codol 1981) (self-efficacy), and feelings of personal worth (self-esteem) (Abrams and Hogg 1988). Vignoles et al. (2006) have extended this to identify two more identity principles, or motives: belonging—the need to maintain feelings of closeness to and acceptance by other people (Leary and Baumeister 2000)—and meaning, the need to find significance and purpose in one's life (Gergen and Gergen 1988). They emphasise that these six principles may not be exhaustive, are defined as pressures towards certain identity states and away from others and guide the processes of identity construction, and people may not necessarily be aware of them. On the basis of detailed analysis across a number of studies, Vignoles et al. (2006) conclude that each of these identity principles made a substantial and unique contribution to predictions of (positive) affect and identity enhancement, confirming that none of them is redundant or subservient to the others.

While originally developed as a theory about reactions to threats to identity, where 'threat' at some level is continuous as social and personal circumstances change, identity process theory is general a model of identity dynamics, of the routine operation of these four key principles in achieving identity structures. What emerges from the body of detailed applications of the theory is that self-esteem and self-efficacy are relatively constant in individuals over significant time periods, suggesting that "any changes that are wrought in identity are actually not effecting modifications in the overall subjective assessment of self-esteem or self-efficacy over time" (Breakwell 2014: 34).

While many aspects of identity appear relatively stable over time (Breakwell 2004), identities can and do change through the ongoing processes of identity work. This involves the twin processes of assimilation-adjustment and evaluation (Jaspal 2014); assimilation in terms of the absorption of new information into the identity structure and accommodation in terms of the adjustment that takes place for it to become part of the identity structure; evaluation as the process that confers meaning and value on the content of identity. These twin processes can be engaged in both informally, in the

course of everyday interaction and exchange, and explicitly in the form, for example, of participation in leadership development programmes which challenge participants to define, construct and modify their identities. Following Coyle and Murtagh (2013), from a social constructionist perspective, identity can be construed as taking up, according, resisting and negotiating subject positions within discourses (Davies and Harré 1990), where subject positions can be understood as "sets of images, metaphors and obligations about the sort of responses people can make in interactions that are informed by associated discourses" (Coyle and Murtagh 2013: 44). As such, identities are not just located in individual psyches but are negotiated in social relationships. In exploring these issues in the family business context, we use Identity Process Theory (IPT) as the framework for understanding the process of identity negotiation in the family business, both as observed in natural identity-relevant settings (e.g., the workplace) and in the formalised arenas of identity work afforded by off-site leadership development.

Identity process theory, as outlined above (Breakwell 2014), provides a useful perspective for research on identity in the family business setting. First, it is concerned with the holistic analysis of the total identity of the person, encompassing elements dynamically derived from all aspects of experience. Identity is, in other words, both a dynamic process and a dynamic state of being, with relatively predictable states of identity—leader, entrepreneur, family business owner—that are sought. Identity derives from social category membership and other aspects of experience in the social world: as a multidimensional complex phenomenon, this view of identity better accommodates the reality of the family business situation. Second, this approach emphasises the agentic role of the person while acknowledging that social identities, as part of the holistic identity, are derived from category memberships and representational processes. For family business research, this provides a basis for overcoming the organisational/individual and personal/social dichotomies that bedevil the current discourse of identity in the field. Third, identity process theory provides a framework for understanding both the structure of identity and the process by which identity changes. If much identity theory has been criticised for taking identity as fixed, more recent processual views of identity, as some of its advocates recognise (Gioia et al. 2013), can be criticised for going too far in the other direction and arguing that identity is all process and evolution. Fourth, identity process theory has at its core a theory of identity change in response to threat. This threat may be substantial in terms of preventing the construction and maintenance of identity, or it may be everyday in terms of situational and personal changes that require the renegotiation of identity. Obviously, new venture creation, business restruc-

turing, intergenerational transfer of the business, intra-family personal and professional conflict and business succession represent potential threats that, if subjectively recognised as such, have the potential to trigger identity change. One key coping mechanism in the face of identity threats is participation in external programmes to provide knowledge, skills and support through coaching and mentoring on which the person can draw in the process of (re)constructing their identity, and it is to this that we now turn, with specific attention to leadership development (Harrison and Leitch 2018).

Leadership and Identity Formation

The importance of understanding leadership and leadership development as an identity workspace for the family business reflects both the heterogeneity of the family business and the nature of the wider context within which it operates. In an increasingly global, turbulent, unpredictable, uncertain, competitive and hyper-connected business environment (O'Connell 2014; Bennis 2012), it is unsurprising that there has been growing interest in leaders and their abilities. However, leader and leadership development is struggling to keep pace with the requirements of the twenty-first century: "leader development, even more than leadership, lacks definition, theory, agreed upon constructs, and effective processes" (O'Connell 2014: 184). In this chapter we develop a transformative learning perspective on identity work and leader development in a family business context. This builds on four recent trends: first, calls for more and better leadership (Petriglieri 2011a) following the 2007–2008 global financial crisis (Knights and McCabe 2015) and as a response to so-called VUCA (volatile, uncertain, complex, ambiguous) environments (Horney et al. 2010; Petrie 2011); second, growing interest in the role of identity in the emergence and effectiveness of leaders (De Rue and Ashford 2010), given that how individuals see, feel and think about themselves and behave are issues of identity (van Knippenberg et al. 2004; Leary and Tagney 2003; Day and Harrison 2007); third, recent applications of transformative learning theory to identity and identity work (Illeris 2014a, b); and fourth, calls for leader development research to be more sensitive to organisational context, and to entrepreneurial and family business contexts in particular (Coglister and Brigham 2004; Vecchio 2003; Kempster and Cope 2010; Leitch et al. 2013; Harrison and Leitch 2015, 2018), not least because they are distinctive in terms of ambiguity, risk, uncertainty, innovation, environmental dynamism and volatility, organisational size and newness (Chen 2007; Surie and Ashley 2008; Autio 2013).

In so doing, we recognise that developing family business leaders involves a complex set of processes requiring enhanced understanding of learning and development (Day et al. 2014). However, identifying appropriate pedagogical approaches to encourage self-reflection and self-awareness remains a challenge (Petriglieri et al. 2011). As leader development occurs in the context of ongoing adult development (Day et al. 2009), we demonstrate how transformative learning theory provides a framework for understanding the development of leader identity.

With the exception of Cope's (2005a, b; Cope and Watts 2000) work, there has been little substantive discussion of transformative learning in entrepreneurship or family business research. However, transformative learning shares with identity process theory an emphasis on the challenge of adapting to changing circumstances (Ciporen 2010; Cope 2005a; Johnson 2008) and the transformation of individuals' frames of reference after an encounter with a critical event or disorienting dilemma to make them more applicable in a new situation (Dirkx and Mezirow 2006; Mezirow 2011). In other words, this transformation changes the way people understand themselves and their relationship with others and the world (Franz 2010; Hodge 2014). After such a transformation of perspective, individuals have adapted existing or adopted new ways of thinking and doing, including the shaping and reshaping of their identity, which they can apply in their actions (Dirkx and Mezirow 2006; Isopahkala-Bouret 2008; Howie and Bagnall 2013). The relevance of transformative learning to identity formation in the family business context arises from, first, the emphasis it places on learning from critical incidents (Cope 2005a; Harrison 2016) and disorienting dilemmas (Mezirow 2011); second, its ability to handle the complex issues the entrepreneur faces (Cope 2005a; Johnson 2008; Pittaway and Thorpe 2012); third, the high rate of disorienting dilemmas, critical incidents and threats arising from the close involvement of the family in the business (Hartog et al. 2010); and fourth, the specific identity challenges presented by the work role transition from non-entrepreneur to entrepreneur, from family member to family business executive (Isopahkala-Bouret 2008).

However, elsewhere, interest in transformative learning and the development of identity is growing (Gray 2006; Trott 2013; Schyns et al. 2013; Conklin et al. 2013; Hawkins and Edwards 2015). Transformative learning, initially developed as an approach to adult learning theory (Mezirow et al. 1990, 2009), is concerned with acquiring, developing and changing understandings of and dealings with essential life conditions and the outside world. However, critics have argued that it is not sufficiently explicit about either the learning process or the outcome of that process, that is, "what is

actually transformed?", and that its sole focus on the cognitive dimensions of learning is limited (Illeris 2014b). Drawing on Erikson's (1968) understanding of identity as psycho-social (Illeris 2014a: 40) has re-defined transformative learning to comprise "all learning that implies changes in the identity of the learner".

Contemporaneously, there has been increasing interest in identity and self-awareness in leader development theory and practice (Carroll and Levy 2010; Ibarra et al. 2010; Day and Harrison 2007; Lord and Hall 2005; Hall 2004). For instance, Ely et al. (2011) have conceptualised leadership development as identity work, while Petriglieri (2011b) has described leadership development programmes as identity workspaces. Much of this research, however, has been uncritical, focused on how leaders' identities are developed, maintained and enhanced in a leadership development setting (Nicholson and Carroll 2013). However, the elements that enhance or constrain leader identity construction are still not fully understood (De Rue and Ashford 2010; Ibarra and Petriglieri 2010).

In the remainder of this chapter, we set out to do the following. First, we extend transformative learning theory to identity work to illuminate the process by which an individual constructs his/her identity through and beyond participation on a leader development programme. Second, we build on the literature on identity work as a form of transformative learning to show how the identity work an individual engages in as part of their leader development impacts on their enactment of leadership. Third, we illustrate the importance of designing an extended learning arena in leadership development programmes in which both personal and intersubjective development occur for participants. Finally, we present a transformative learning-based framework for leader development in a family business context.

Transformative Learning, Identity and Leader Development

Transformative learning, predicated on a view of learning as change (where the condition, meaning or understanding of something already acquired is changed), rather than learning as addition (where something new is added to that already acquired), was originally grounded in work on the emancipation of women learners (Mezirow 1978; Illeris 2014b). The focus is on that which shapes our understanding of ourselves, qualitative changes in meaning perspectives, mind-sets, worldviews, frames of reference and habits of mind. Achieving this requires both the capability to self-reflect (Kegan 2000) and

reflective judgement (King and Kitchener 1994), that is, the ability to assess the assumptions underpinning beliefs, values and feelings. Fundamental to this reflexivity is the promotion of self-directed learning and agency (Bennetts 2003) resulting in changes in an individual's future behaviours and decisions potentially leading to improved performance and emotional wellbeing (Mezirow 1991, 2003). Recently, there has been increasing disquiet that the emphasis on critical reflection, open discourse and implementing new understandings in practice is too narrow and too focused on cognition (Newman 2012). In re-defining transformative learning to highlight its radical nature and encompass social and emotional elements as well as cognitive, Illeris (2007, 2014b) emphasises the importance of relating to one's self, to one's existence and to the outside world. This can occur in interconnected processes both through the design and delivery of formal leader development programmes, in which participant-facilitator, peer-to-peer and self-oriented learning can all occur, and in individual processes of leader identity work. In other words, fundamental to understanding one's self is the concept of other and, in particular, our relationship with those with whom we interact. Indeed, it is frequently through this interaction that learning occurs (Bennetts 2003). Key to transformative learning theory is how one experiences being in the world and relates to and is experienced by others, and this in turn resonates with identity (Illeris 2014a).

Although the terms 'self' and 'identity' have been used interchangeably, a distinction between 'self' as a psychological concept and 'identity' as a shift towards the social side of the individual-social dichotomy can be made (Tennant 2012: 9). From an individual psychology perspective, identity explains how the social becomes an integral part of individual psychology, while from a social perspective, identities can be "resisted, contested, and negotiated by challenging the interpretive systems underlying them" (Tennant 2012: 9) including traditions, institutional rules, social norms, modes of discourse about others and views of what is 'natural'. For Illeris (2014a: 31–33), identity is not a firm, stable, mature personality developed over a period of time through a succession of fixed stages but a flexible and responsive development of the self, the person, the identity and the biography, through creating the ability to and readiness for change and renewal.

In an echo of the emphasis in identity process theory on identity as both a dynamic state and a dynamic process, identity in transformative learning therefore becomes a task, a life project which is incomplete and for which we continually strive becoming what, and who, we are. Illeris (2014b) argues that identity or identities are formed and influenced by unique and individual characteristics and traits, and shaped by social interaction with others through

group membership and roles. Evidence that transformative learning has occurred is signalled through any change in identity: "given that identity is the core of life, transformative learning is the process by which we deal with constant possibility, urge and necessity to change and transform elements of our identities" (Illeris 2014a: 579). In short, learning transforms our identity. Clearly this type of learning is more than just the addition of new knowledge and skills and is based on restructuring and changing our existing beliefs and discourses and how we narratively construct ourselves (Driver 2010; Cunliffe 2002).

Moreover, it is an ongoing process in which the self is conceived of as having a definable and malleable identity (Perriton 2007) which is shaped by the operation of the twin processes of assimilation-adjustment and evaluation on identity principles (continuity, distinctiveness, self-esteem, self-efficacy, belonging, meaning). Identity in this sense as subjective experience rather than objectivist 'essence' is not constructed in a social or cultural vacuum, and there are likely to be situational variations in how these identity principles are satisfied (Vignoles et al. 2006: 328): "for example, a sense of continuity may be maintained by denying change or by constructing a narrative account of one's history (Chandler et al. 2003); similarly, a sense of distinctiveness may be derived from feelings of difference and separateness or from one's unique position in a network of social relationships" (Vignoles et al. 2002). As such, these variations will have important implications for the types of context (cultural, organisational) and event that will satisfy each identity principle, and hence for the cognitive and behavioural strategies that people adopt to maintain, enhance or defend their identities (Vignoles et al. 2006: 328). Specifically, the implications of the different ways in which individuals can construct feelings of continuity, distinctiveness, self-esteem, self-efficacy, belonging and meaning remain an important and challenging area for research (Breakwell 2014). The heterogeneity of the family business will necessarily be matched by the heterogeneity of family business identities and identity processes. In developing such an integrated theory of identity development, we can identify two major implications against which interventions such as transformative learning can be understood. First, people are motivated to adopt an identity (e.g., leader, entrepreneur, business person) to the extent to which it can provide feelings of continuity, distinctiveness, self-esteem, self-efficacy, belonging and meaning; in particular, if the focus is on enhancing cognitive identification, more emphasis should be placed on self-esteem, continuity, distinctiveness and meaning, whereas attempts to increase the enactment of particular identities might emphasise self-esteem, belonging and efficacy (Vignoles et al. 2006). Second, threats to identity can be recast in this

perspective as events that undermine feelings of continuity, distinctiveness, self-esteem, self-efficacy, belonging and meaning. As the case study below will show, this provides a very useful perspective on identity change in the family business.

Traditionally, the focus of transformative learning has been on individual change, and organisations have been viewed as the context for change, not the target of the transformative process (Henderson 2002). However, learning in an organisational context changes who we are, how we see and how we do things (Driver 2010). Despite recent revisions, modernisations and extensions (Illeris 2014b; Taylor and Cranton 2012), transformative learning remains focused on education: "transformative learning in working life … is not included … there is no place or publication where a similar systematic, adequate and comprehensive presentation of transformative learning in these areas can be found" (Illeris 2014a: 12). It has its roots in the view of learning as a "process of constructing meaning; it is how people make sense of their world" (Merriam and Caffarella 1999: 261), and has close parallels to action learning (Marsick and Watkins 1990; Yorkes et al. 1999), an approach to organisation development that promotes transformative learning in working life (Illeris 2014a: 138).

This shift from the purely individual to the organisational recognises that individual identity is enacted and changed in and through context-dependent learning (Baker et al. 2005; Cunliffe 2002). This interplay between identity and activity is particularly important for leaders to appreciate (Petriglieri 2011a) because of the profound implications the enactment of their leader identity can have on others. As Illeris (2014a: 143) argues, without development or explication, managers and leaders, in shaping their identities, have a need to understand and experience transformative learning and "participate in courses that involve the creation, practice, evaluation and reflection of transformative processes". Appropriate leader development programmes and experiences play a vital role in identity development, in response to identity threats arising from both personal development issues and in external changes in social and professional roles and contexts.

However, reflecting our critique of identity in family business research above, in leader development, an essentialist conception of identity has tended to be adopted, with functionalist and constructivist approaches more common than social constructionist perspectives (Carroll and Levy 2010). Functionalist approaches, based on conceptual, skill-building, personal growth and feedback view identity as another tool which participants on leadership development programmes can deploy. By providing leaders with an organising structure, source of motivation and store of stories and experiences

on which to draw, increased personal and organisational performance should follow (Carroll and Levy 2010; Lord and Hall 2005). Constructivist approaches on the other hand adopt a longer-term view of development based on the belief that, having acquired certain skills and capabilities such as self-reading, self-authoring and self-revising, an individual can move along their personalised pathway of identity development (Kegan 1982, 1994; Kegan and Lahey 2001). This assumes that identity construction is "predominately unitary, cognitive, linear, ordered, essentialist and internal" (Carroll and Levy 2010: 216).

In developing a transformative learning approach to leader identity development, we eschew such essentialist conceptions and recognise, as does identity process theory, that social context is central to identity formation. As identities are shaped by social interactions, they require enactment in social settings to be sustained (Petriglieri 2011a). This, in turn, necessitates the continuous development of knowledge, skills and human capital (Anderson 1998; Hitt et al. 1998). Such identity work undertaken by reflexive subjects is a dynamic and iterative process that is enacted within situated contexts and shaped by the characteristics of those involved. It is a set of tactics and processes through which individuals shape, develop, revise and maintain their identity (Sveningsson and Alvesson 2003). Understanding these processes has important implications for our knowledge about actions. An individual's specific pattern of identity work, that is, the processes of identity formation, may also be associated with specific actions, behaviours and meanings. Given this, the analysis of identity work is complex: first, it is processual and ongoing; second, it is dynamic, involving two-way interactional relationships between identity work on the one hand and actions on the other; and third, it is contextual, being intimately and inextricably embedded in a wider dynamic social milieu.

This complexity is matched in leader development, where leaders' needs "have become much more complex as our organizations, our workplaces and our global challenges become more interrelated and unpredictable" (O'Connell 2014). Becoming a leader is not just a matter of acquiring a body of knowledge and practising a requisite set of skills. Instead, in calling for the integration of identity into leader development, scholars recognise the value of deep personal work (Lord and Hall 2005; Petriglieri and Stein 2010; Shamir and Eilam 2005). This involves acquiring a clear sense of one's leader identity and aligning it with one's personal values, history and purpose. Thus, individuals need to examine and revise the ways in which they make meaning of, respond emotionally to and act on experiences, situations and aspirations (Petriglieri 2011a; Petriglieri et al. 2011). Central to this is the narrative of one's life story:

reflecting on this helps to orient one's understanding of, and actions in, the world (Kegan 1982). As such, "it is a combination of reflexivity and contextual instability that propels social actors into experiences of active and even intense identity work such as leadership development courses" (Carroll and Levy 2010: 212). Acquiring and maintaining an identity is not a one-off event but a practice over the course of a leader's career and lifetime (O'Connell 2014).

Much of the leader development/identity literature has focused on (large) in-company leader development programmes or full-time MBA programmes (Ely et al. 2011; Petriglieri et al. 2011). On this basis learning in organisations has been described as an identity-based phenomenon (Gherardi et al. 1998). However, in practice, lifelong learning does not occur only in planned interventions and courses but is more multifaceted, drawing on the opportunities which everyday life presents for the learning of individuals (Bennetts 2003). In the remainder of this chapter, we explore these issues in the context of leader identity formation in a family business context.

Methodology

As context is so important in shaping identity formation (Sveningsson and Alvesson 2003; Watson 2008), we explore identity as a fluid, complex and multifaceted process in which both the external (representation of self) and internal (biographical, lived experience) perspectives are important. Following Sveningsson and Alvesson (2003: 1170), who argue that "identity issues call for considerable depth and richness, we employed a single longitudinal case study research design" (Watson 2008; Marlow and McAdam 2012; Goss et al. 2011). If leader identity work is viewed as a key feature of contemporary social organisation with its own institutional logic, then a case study approach provides an example of the complex microdynamics of identity formation as a transformative learning process. Equally, if identity is conceptualised in terms of the narratives people craft and enact to achieve social relevance and comprehensibility and coherence over time and identity change occurs through the renegotiation and restructuring of narratives (Breakwell 2012; Coyne and Murtagh 2013), then a longitudinal approach allows the researcher to access both the respondent's understandings of their identity processes (e.g., from retrospective self-report data) and the actuality of these. In applying a micro-foundations perspective, we employ the entrepreneurial journey framework (George and Bock 2009; McMullen and Dimov 2013; Selden and Fletcher 2014), which provides an experiential, constructivist approach to entrepreneurial behaviour.

Research Context and Data Collection

The context for the case is a family business established in a traditional, manufacturing sector in a socially conservative region (Northern Ireland) by three founders (father [James], son [Sam] and daughter-in-law [Mary]). In illustrating the process of identity formation, we concentrate on Mary's narrative. Despite lacking an entrepreneurial background and any technical or industry knowledge, she has emerged as the driving force within the founding team. Furthermore, she has participated in an entrepreneurial leader development programme. Thus, her experiences provide a particularly rich and rewarding opportunity to investigate the shifting and fluid process of leader identity construction.

A longitudinal case study offers a valuable opportunity for the real-time study of identity in process, avoiding the dangers of relying only on retrospective, (re)-constructed accounts and providing a context for understanding and interpreting interview-based material (Duxberry 2012; Mallett and Wapshott 2012). Data were collected through unstructured open-ended interviews and informal conversations over an 18-month period. First, key elements in Mary's life history were explored (Marlow and McAdam 2012), eliciting a retrospective, auto-biographical narrative of various lived experiences that illuminate how she had arrived at her current role and position as a business leader (Haynes 2006). Second, in ongoing, real-time interactions with her, the temporal unfolding of her identity construction within the context of personal, family and business circumstances was observed and discussed. Our intention throughout this process was to be open to "gaining an insight into the experiences, concerns, interests, beliefs, values, knowledge and ways of seeing, thinking and acting" of Mary (Schostak 2006: 10). This reflects case study research as a narrative genre in which there "is not, outside the realm of human discourse itself, a level of facticity that can guarantee the truth of this or that representation" (Beverley 2000: 561). All interviews were recorded and transcribed verbatim to provide a text for analysis.

Data Analysis

Given that identities are not just located in individual psyches but are negotiated in social relationships, the process of identity formation through identity work can be studied "through naturally occurring data generated in identity-relevant settings" (Coyle and Murtagh 2013: 45). Narrative analysis is routinely used in self- and identity studies (Crossley 2000). This views

identity in terms of the narratives crafted and enacted by people about themselves to create coherence over time, and views identity change as taking place through the renegotiation and restructuring of narratives (Breakwell 2012; Howitt 2010).

The analysis followed the protocols of grounded theory (Strauss and Corbin 1998; Glaser and Strauss 1967). This uses different modes of analysis, notably variable analysis (associated with quantitative analysis) and naturalistic enquiry (rooted in the symbolic interactionist qualitative research tradition) (Dey 2007). Less common in grounded theory is the focus on narrative, notwithstanding the emphasis on core category identification and coding following from, rather than explicating, a storyline or descriptive narrative of the central phenomenon of the study (Strauss and Corbin 1990: 116–117; Dey 2007: 184). As Dey (2007) highlights, in narrative explanation, the emphasis is on retrodiction, the intelligibility of the conclusion, rather than prediction. This is based on the coherence of the narrative as a matter of synaptic judgement, or configurational comprehension in Polkinghorne's (2010) terms, in which things are understood as elements in a single and concrete complex of relationships. As such, narrative is the basic manner in which we make sense of and structure experience, and draws attention to process in terms of temporality via the stages and sequences of events and the evolution of conditions, interactions and consequences (Dey 2007: 184–185).

Given that our research makes knowledge claims, not about some objective reality but about how individuals interpret that reality (Fendt and Sachs 2008), we adopted a constructivist approach to grounded theory (Mills et al. 2006; Wertz et al. 2008). Narrative analysis is an interpretative approach involving the subjectivities of both researcher and participant and uses a prior conceptual framework to analyse texts. Constructivist grounded theory, on the other hand, while focused on intersubjectivity, aims to develop the conceptual framework from the research data (Charmaz 2011: 300). Our starting point is that our research participant(s) are linguistic meaning makers and that meaning making is a performative process that is "at once embodied, cognitive, practical, emotional, interpersonal, social, cultural and temporal" (Wertz et al. 2011: 330).

In terms of the research process, combining the narrative approach with constructivist grounded theory (Mills et al. 2006; Burck 2005; Floersch et al. 2010) has a number of implications (Wertz et al. 2011: 330–331). First, it requires reading the (written or oral) verbal data as a whole, paying attention to their internal organisation, content, modes of meaning construction and contexts. Particular attention was paid to the situation in which the data were

collected and the wider life history and socio-cultural backdrops to them. Second, this research is relational, in that as researchers we became personally involved with the text, understanding the material in the light of the resonances between our human experience and meanings and the expressions of the participant. Third, notwithstanding this empathetic relational identification with the participant, as researchers, we also stepped back and saw her as other, maintaining a distance that allowed us to focus on the ways in which she constituted, organised and lived her identity making. Finally, this research is radically empirical and data based, the results of which are emergent rather than projected or imposed; as such it highlights "the emergent qualities of the method and … its potential for sparking new theoretical analyses" (Charmaz 2008: 168).

Findings

In this section we present the narrative of how Mary's identity has been constructed based on her reflections on, and interpretations of, her evolving role in the business. Three overarching themes emerge (Table 25.1): first, identity construction comprises her previous knowledge, expertise and experience, personal attributes and capabilities, including references back to the situational specific implications of her formative years and learning; second, leadership development reflects her growing awareness of being a business owner; and third, organisational context comprises both the dimensions of the business itself and the dynamics of the family/business interface.

Identity Construction

In terms of her identity, Mary has been on a journey from a position where she did not know what she was doing at the inception of the business to one where she described herself with some degree of self-confidence as a business owner (Table 25.2: A1; F1). At the outset, the founders faced a steep learning curve in that while James had some knowledge and management skills, he had no wider commercial and business development experience and Sam's expertise was restricted to technical and operational aspects (A2–A3). In the absence of any other management team, this meant that Mary did not have access within the business to coaching, mentoring and role models to help her grow into the role of director/owner (A4).

Table 25.1 Inductive analysis and data coding: the case of Mary

Open coding (concepts/codes)	Axial coding (categories)	Selective coding (themes)
Knowledge and expertise	Knowledge, expertise and experience	
Lack of knowledge		
Experience		
Acquisition of knowledge		
Job role and skills		
Confidence	Personal attributes	**Identity construction (IC)**
Naivety		
Self-awareness		
Self-confidence		
Initiative		
Adaptability		
Influencing		
Differentiating characteristics		
Managing change		
Fear		
Formative years		
Personal attributes		
Self-reflective		
Gender		
Delegation		
Self-efficacy		
Learning dimensions	Learning and development	
Training		
Leadership development		
Peer learning		
Learning orientation		
Leadership	The practice of leadership	**Leadership development (LD)**
Developing awareness of being a business owner		
Relationship between leader and business		
Role and leadership		
Contingency of entrepreneurial leader role		
Legitimacy		
Partnership roles and mutual dependence		
Nature versus nurture (born not made)		
Formal title versus role played		
Discipline		

(*continued*)

Table 25.1 (continued)

Open coding (concepts/codes)	Axial coding (categories)	Selective coding (themes)
Funding	Business issues	
Investor relations		
Recession and economic climate		
Competitors		
Customer benefits		
Commercial awareness		
Overview of business		**Organisational context (OC)**
Change		
Survival of business		
Serendipity	Family business dynamics	
Owner-manager		
Succession planning		
Business as child		
Maternalistic nurturing		
Family dynamics		

Initially Mary was uncomfortable in the new venture, which is displayed in her frequent allusions to a lack of confidence, fear and concerns about her ability to effectively carry out her role (B1). Much of this appears to be situational. In our first interview with her, she reflected on her earlier move from a machinist in the textile industry to becoming an engineer's assistant in electronics assembly (B2). However, the confidence engendered by this move was not transferred into the new venture. Mary did not identify herself as a director, owner or leader; indeed, she did not even consider herself capable of being a competent bookkeeper.

Despite initial growth in sales and employment, the company experienced significant problems. In the first year, James made an expensive error in materials ordering which almost led to bankruptcy. This was compounded by his poor managerial skills, particularly supervising the shop-floor employees. To address the financial shortcomings, the venture's investors had to re-finance to a larger extent than had been anticipated, taking a 50 per cent stake in the business. Also around this time, as it became increasingly clear that the commitment required to launch and grow a successful business far exceeded his expectations, James indicated that he would like to retire.

These events represented a turning point for Mary, which stimulated her to consider formal learning and development opportunities (C1). On the suggestion of an external business development advisor, she decided to attend a leadership development programme targeted at leaders/owners of new and

Table 25.2 Entrepreneurial identity construction

Identity construction (IC)	Leadership development (LD)	Organisational context (OC)
A: Knowledge, expertise and experience	C: Learning and development	D: Business issues
A1: I had no experience at all, I had absolutely no experience in business or bookkeeping or anything, I had spent my whole life on a shop-floor… [this was] a massive step… but because I put some money in, James made me a director of the company, which again was a huge, great big step and I felt as if I was totally out of my depth at that point, I didn't know what to do.	C1: We thought, he's [James] the only one that's got any management experience here, what on earth are we going to do?… [so] we started looking into what training we needed to take the company forward if James left. C2: When [programme director] was here telling me about the course, I was very enthusiastic about it and then I got cold feet with the price of the course and I thought "am I worth spending that kind of money?" C3: We had a bit of a discussion about it and we decided that yes, I should do it anyway… I need to do something to get me to the level I need to be at. It's something that needs to be done.	D1: I think if anybody can get themselves through this [the recession], then they have got the right to call themselves a business person because it's taken some very, very hard decisions and some real, real tough measures to get us to this point.
A2: James was the only one that had any management experience, he had no business experience, he still doesn't but he had a bit of management experience, so it was him and I that did the [initial shop-floor recruitment] interviews and we picked all the wrong people, you know, we just didn't have a clue, we sort of went on a wing and prayer.	F: The practice of leadership F1: Belief in myself. I think I can quite honestly hold my head up now and say I'm a business woman. I would never have done that before. F2: It was finding out that I wasn't a million miles away from where I needed to be, that I was instinctively doing the right things. Before that I had been very, very doubtful about whether I was doing things right or not.… [Now] I know I've got something about me that a lot of people don't have. I don't even think its ambition, so I don't know what it is. I call it initiative, I've got a lot of initiative, I can go into a situation and I can see what needs to be done and I can get on with it… there's not an awful lot of people that have that.	
A3: For the first year and a half I would say, Sam worked on the shop-floor, until his back was that bad that he couldn't do anymore and he had to start on lighter duties.		
A4: I don't have business experience, I don't have role models to learn from, I've not been brought up in business, I've just been flung in—I need to know that I'm doing the right things.	F3: I'm saying I don't see myself as a leader… maybe I've lost my definition of what a leader is… because the more I'm talking about it the more I'm thinking I probably make an awful lot of decisions and not force a lot of things to be done… [for example] if we're needing to cut costs and things like that, the initial ideas or the initial thing would be for me to say this is what the state of the company is and we need to do something about it.	

B: Personal attributes

B1: No, I was frightened. I'm still the same, it feels that I've been frightened all my life and I'm thinking: no, I'm going to do it now.

B2: I loved that job, it was very interesting. So, I suppose that gave me a wee bit of confidence in myself that I was capable of doing an awful lot more than what I had done in the past.

B3: The grammar group who were all her favourites and she wanted to teach them because she thought that they would go far and… the group where she couldn't be bothered with the pupils… So we were left at one side of the room with a book to read, you know, left to get on with it ourselves.

B4: She went, you must be joking, she said you think I'm going to waste my time teaching you, she said you will never amount to anything in your life. And that has stuck with me forever.

B5: I thought I would feel like an interloper when I went there, I was absolutely terrified… I can remember thinking before I went there they're going to see right through me, they're going to know that I am no good at anything and that there's no way that I am a business person and I shouldn't be there.

B6: I'm much more confident in myself. Things are changing slowly. I've taken more of a leadership role. (observation notes)

E: Family business dynamics

E1: This is our baby… this is our child, this is for us to nurture and bring it up. I think if Sam had retired instead of James, I don't think the business would have survived, if I had retired and either of them had stayed I don't think the business would have survived. I think it needed what happened to happen.

growing businesses. This opportunity for learning emerged more as an enforced response to circumstances than a manifestation of a growing awareness of leader identity (C2). The lack of self-worth this highlights relates back to a specific incident from Mary's primary school education, when at 10 years old she was assigned to the 'non-academic' stream in her class (B3). The teacher's response to Mary's challenge to this decision had major consequences for her self-esteem (B4).

Leadership Development

While the negative consequences of this stigmatisation continue to show in Mary's lack of self-confidence, she perceives that, nevertheless, it drives her to achieve. In the context of the current narrative, her decision to participate on the leadership programme was her response to what she saw as another challenge, to become confident in making decisions (C3). It is not that she did not make decisions or that they were not the correct ones but that she was not always assured that they were right. As she put it on the first day of the programme, she did not have business experience or role models against which to anchor her sense of leader identity (A4).

However, by the end of that day, she realised that she was not the only participant lacking self-belief in their capabilities. More specifically, she began to appreciate that problem solving and decision-making abilities do not come naturally to many individuals, including those she considered to be successful business leaders, prompting an appreciation that she has these natural capabilities. At the end of the programme, she was able to reflect more expansively on what she had learned, in terms of her developing confidence in her ability and a growing sense of identity as a legitimated business owner (F2). For Mary the structured learning and development process provided by the programme played a central role in the construction of her identity. Not only did it stimulate her to revaluate incidents in her formative years and their impact on her sense of self, it also provided a framework for conversations with her peers, coaches and facilitators, which led her to reconsider who she was. She summarised this change as a shift in her sense of identity from imposter to legitimate business owner (B5) who takes more of a leadership role (B6). This was very much a learning process, re-emphasising that a critical outcome of ostensibly business development programmes for owner-managers is personal rather than business development per se (Leitch et al. 2009).

Organisational Context

Mary's articulation of her developing sense of identity is couched in her more developed business and commercial awareness as well as her belief that increasingly she is displaying a number of key leadership behaviours. In terms of business awareness, she attributes the survival of the business through the recession to the guidance she and Sam have provided (D1). However, Mary has not incorporated a sense of being a leader into her emerging identity, notwithstanding the fact that she participated on a leadership development programme. Indeed, she explicitly rejects the leader identity in favour of one based on the day-to-day, operational activities in which she actually engages (F3). This no doubt reflects the particular socio-cultural context in which she is embedded: as a woman in a traditionally male-dominated industry located in a conservative patriarchal-dominated region, this is likely to help reaffirm her insecurities as a leader, constraining how and to what extent she looks like and is perceived as and perceives herself as a leader (Stead 2014; Hamilton 2014).

Whether in terms of viewing herself as a business owner or leader, Mary's constructed identity is partial, fragmentary, in a continuing state of evolution and emergent in the process of conversation, including those with the researchers. One particular incident crystallises this. As noted above, Mary, Sam and James had brought investors into the business to fund their planned expansion. However, when James retired, the investors sought to move her and Sam into different, non-core operational roles and employ a professional manager to run the company. For Mary this was anathema and presented one of the clearest expressions of her emerging identity as a legitimate business owner (E1). Although she did not have the designation of CEO, as she was prepared to continue to recognise this as Sam's formal job title (in a manifestation of conservative patriarchy), Mary acknowledges that in this instance it was she who drove the negotiations to exit the investors and restore full control of the business to the family.

Discussion: Transformative Learning and the Construction of Identity

Based on our case analysis, in this section we develop a transformative learning framework for understanding identity work in leader development that arises from and makes sense of the narrative and provides a basis for the

development of effective leader development programmes. The case narrative highlights the interconnected relationships among the three themes: identity construction occurs in a process of dialogue between personal attributes and knowledge, expertise and experience, within the particular confines and opportunities of an organisational context, as a process of leadership development. Together, these reflect transformative learning in action as an extended learning arena in which transformative learning pedagogically underpins the other three elements (Fig. 25.1).

Specifically, the transformative learning process linking identity construction, leadership development and organisational context can be thought of as comprising six interdependent processes which provide the principles for leader development programme construction (Fig. 25.2). Specifically, this transformational learning process can be thought of as a type of identity work through which identity is shaped in response to challenge and threat. Identity as a process in turn shapes and is shaped by cognitive identification and identity enactment, which are, respectively, the manifestation of the identity principles of meaning, continuity, distinctiveness and self-esteem, and efficiency, belonging and self-esteem.

As described above, transformative learning begins with individual experience, the development of experience and reflection and generation of new ideas and understandings of oneself and his/her surroundings. In this, as Mary's case demonstrates (e.g., in her recollection of significant school

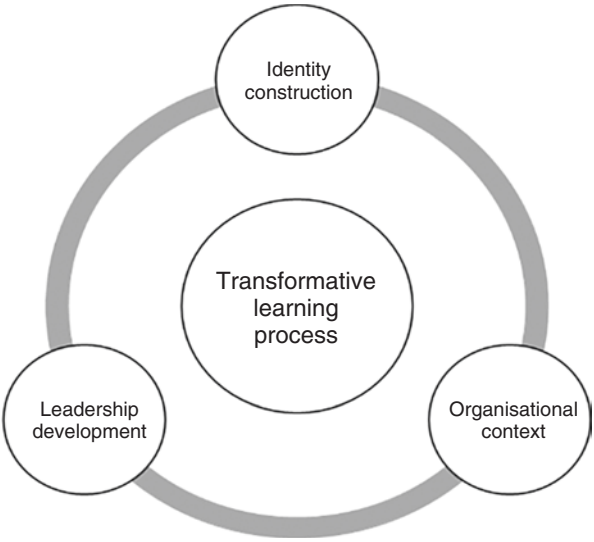

Fig. 25.1 Transformative learning and the narrative of identity construction in the family business

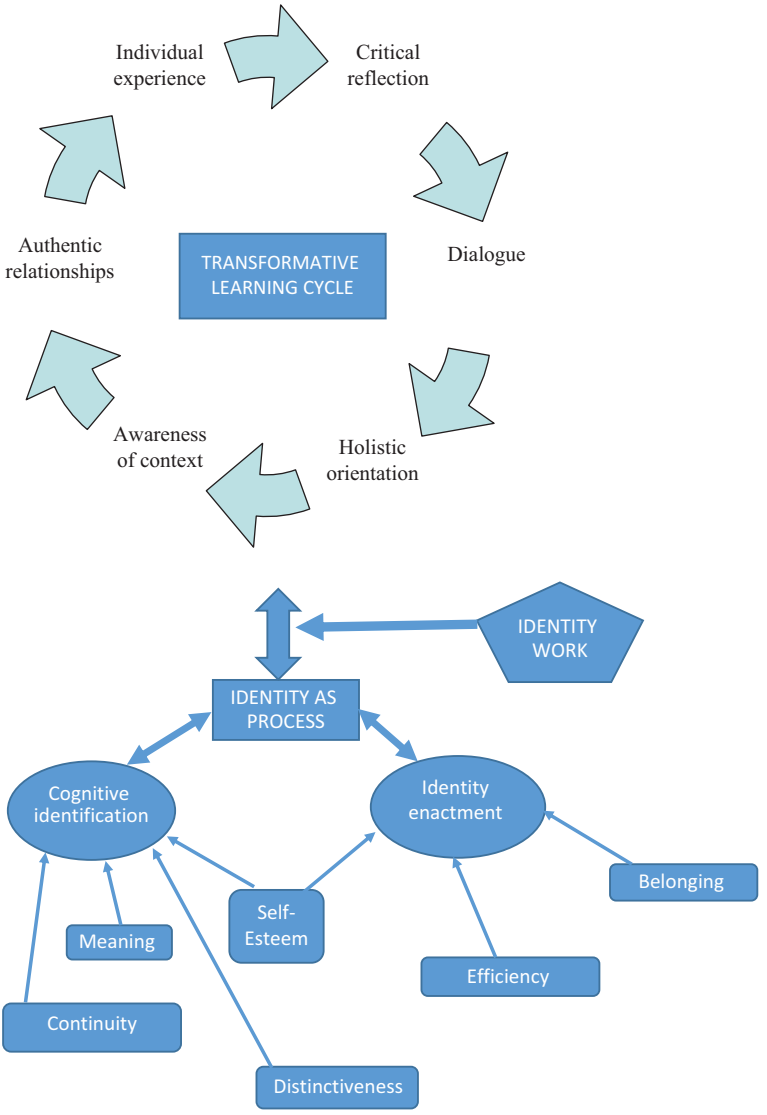

Fig. 25.2 Processes of identity formation, identity work and transformative learning

days' experiences), the life experiences of individuals are central to the learning process. This is, of course, something individuals bring into the learning process and through that into the process of identity construction. However, this requires critical reflection to be effective: it was only as Mary began to critically reflect on her experiences at school, in her previous working life and in the business that she could incorporate these experiences into her identity work. This reflection concerns not just the content

(meaning perspectives) itself but also the process (how the content is received and elaborated) and the premises (the underlying assumptions and conditions behind the content and process). The emphasis on individual experience and critical reflection in transformative learning reflects to some extent a view of identity as "the self reflexively understood by the person in terms of his or her biography" (Giddens 1991: 53). In this, Giddens' concept of ontological security—the fundamental experience of having a coherent existence that implies some sense of self-aware stability in identity—sits opposite that of existential anxiety. Mary's experience in critically reflecting on her experiences is very much couched in terms of the absence of ontological security. This is reflected in the presentation of herself as unsure and uncertain, unable to provide an adequate response to herself and others as to who she really was. From an identity process theory perspective, this reinforces the importance of self-esteem as an identity principle in both cognitive identification and identity enactment. This identity insecurity arises in part from her position as a woman in a male-dominated industry and region, inclined to measure herself against others and find herself wanting, a deficit mind-set characteristic of the pressure, particularly in typical male industries, to 'restore the gender order', in which she needs a man to enhance her legitimacy (Marlow and Ahl 2012).

One response to this existential anxiety, and the third element of the transformative learning process, is dialogue, the process of social interaction with self and others. This serves three purposes in a transformative learning approach to identity formation. First, dialogue provides the basis for drawing on and responding to experience and critical reflection, through what Habermas (1981) refers to as communicative learning or discourse, oriented to best judgement, as opposed to instrumental learning focused on generating truth claims. Second, dialogue provides a basis for discovering, challenging and exceeding the boundaries of the individual. Third, in so doing, it goes beyond analytical discourse to involve direct attention on the attitudes, emotions, personalities and values of the individuals. As Mary's narrative makes clear, her participation in a formal leadership development programme provided opportunities for such dialogue that fundamentally challenged both her sense of identity and her sense of what was possible. As such, experience becomes more of a text than raw material, the personal meanings of which are triangulated "alongside the meanings of engaged others and the presence and influence of different contexts and different discourses" (Usher 2009: 183). Experience, in other words, is always a site of struggle where the meaning and significance of that experience as it is cultivated and reflected on in a learning

context is contested. Thus, experiential learning, and identity work, must be seen in terms of the institutional and socio-cultural contexts within which they function and from which they derive their signification (Usher 2009).

This approach to dialogue as a critical reflection on experience requires a holistic orientation in the learning process with cognitive, emotional and social dimensions. Given that experiential learning as a central element in this framework is necessarily a holistic process, culturally and socially constructed and influenced by its socio-emotional context (Boud et al. 1993), identity construction through transformative learning involves affective learning in which emotions make the learner question their central assumptions and convictions (Taylor 2009). In extremis, this may lead to a view of identity as a fractionalised, unstable and fluid social construction formed out of interaction and social relations (Gergen 1991). As Mary's narrative suggests, engagement in expressive ways of knowing and working, including the rituals of a leadership development programme, community building within the business and empathetic connections with family, business colleague and programme facilitators becomes a response to this fragmentation.

While role enactment, particularly in the family business context, is closely associated with identity construction (Turner 1999), in that "through the enactment of role, individuals learn about themselves, and create their identities" (Hall et al. 2008: 258), Mary's narrative makes clear that this is an episodic, incomplete and often implicit process. Her initial concern about her lack of knowledge, expertise and experience is associated with her personal attributes and, in particular, the negative dimensions of lack of confidence, fear and naivety as they relate to her perceived ability to perform a role in the business. These, together with the more positive personal attributes, for example, initiative, adaptability and influencing skills, in turn underlie the commitment she has shown to learning. Mary's narrative demonstrates that this process is only gradually reflected in a clearly articulated sense of self-identity (Watson 2008). In Mary's case she arrives at a sense of self-identity as a 'business woman' rather than as an 'entrepreneur' or a 'leader', which is at odds with her identity as ascribed by others.

Identity construction through transformative learning is also a function of the awareness of context, not least the appreciation and understanding of personal and socio-cultural conditions and their implications. Insofar as it is possible to interpret a given situation as coherent and congruent with one's meaning perspectives, this defines a mental comfort zone within which a sense of identity is unchallenged (Mälkki 2010: 2011). However, outside or on the edges of this comfort zone, the context is less predictable, the situation

can no longer be foreseen and interpreted, and 'edge emotions' are experiences that are uncertain, even unpleasant (Mälkki 2010: 49). It follows that recent critical experiences in individual's lives are associated with a predisposition to change. In Mary's case, this includes business-based experiences such as the problems with James and the external investors, both of which prompted her to reconsider her role and identity and her initial disorienting experience on the leadership programme. It is clear from her narrative, however, that the programme provided her with time for reflection and dialogue, allowing her to move beyond resistance to the pressures forcing reconsideration of her identity. This occurred through a form of identity defence in which the existing sense of identity was preserved (for Mary, this was predominantly defined in the negative sense of what she was not, with respect to the dominant discourse) to struggling through edge emotions to a place of acceptance, at least in part, of a new identity. Previous research has shown that safe and supportive authentic relationships, notably with facilitators in learning interventions, play an important role in the learning and identity development process (Brookfield 1993, 2000). Learning is a purposive and heuristic process through which patterns of understanding and behaviour change (Taylor 2009). As Mary's narrative demonstrates, the facilitator plays an important role both in legitimating her participation through initial confidence building and in supporting her learning journey by acting as the locus of swift trust (Leitch et al. 2016) that bridged her participation in and integration into the programme.

Conclusion: Implications for Leader Identity Construction in the Family Business

Mary's narrative of identity construction demonstrates the applicability of a transformative learning perspective that emphasises individual experience, critical reflection, dialogue, a holistic orientation, an awareness of context and authentic relationships. Her case reveals the dynamic interconnectedness of experience (identity construction), knowledge (learning and leadership) and organisational context. From this, three overall conclusions emerge. First, in discussing identity, there is a disjoint between the generic socially accepted view and the individual's self-image. For Mary this was clearly and consistently articulated throughout the entire research process. She expressed a view of entrepreneurs, business owners and leaders that was very much at odds with her self-perception, to the extent that for much of the time we interacted with her she saw them as 'other'. This reflects a more general issue

that there is more often than not a mismatch between the categories researchers use to re-present the lived experiences of the participants in their research and those used by the participants themselves, resulting in participants articulating identity descriptors that are not in fact part of their own cognitive map. A deeper awareness of their native categories that is the fundamental concepts that people use to identify and explain to themselves what is happening to them (Buckley and Chapman 1997) is required. These native categories are sufficiently elemental to carry cultural weight and sufficiently familiar to be used constantly and intuitively. The issue here is that the native categories constructed by us in a research community do not necessarily mesh with those in the society or social group we seek to research. In other words, they have connotations, nuances and shades of meaning that are understood in one but not the other, and there are no obvious interlocutory or translation mechanisms between the two. It is for this reason that we have sought to demonstrate the relevance of in-depth, case study research to give voice to our main subject and to explicate identity construction in her own terms and categories.

Second, identity work emerges from our analysis as something implicit, a conclusion at odds with the emphasis in much of the contemporary literature that the construction of identity is deliberately, systematically and explicitly engaged in. At no point in the research did Mary give any indication that she was purposively seeking to construct a particular identity, and to the extent that she can be construed to be engaging in identity work through her professional and personal relationships, conversations, engagements and role enactments; this is not with a view to the self-consciously aware creation of a particular identity. For future research on leader identity, this implies that we need a more subtle understanding of the dynamic interrelationships between the discourses of social identity and the appropriation of these by individuals to themselves. Current research, including that drawn on in this chapter, assumes that individuals consciously and deliberately identify and take on elements of desired, perhaps aspirational, social identities that they then use to represent themselves to the world. The evidence from our research suggests, however, that this process may not be deliberate, explicit and intentional. As a result we will need to rethink the manner in which self-identity is constructed by the individual and socially constructed by the wider community to which they belong (Wenger 1998).

Third, the development of leader identity is driven at least in part by a desire for social legitimacy and acceptance, in an ongoing process of discourse between self and other. For Mary there is a strong connection between key events in her life history (early school, experience, work history, family reloca-

tion) and her desire to succeed in a business venture in which she had no confidence in her ability to lead. Through a series of conversations, including those with the leadership development programme team and the research team, she progressively established herself in her own mind as a legitimate and accepted member of the entrepreneurial, owner-manager community, or affinity grouping (Gee 2000). This is seen, for example, in her acceptance by the end of the research process that she would find it appropriate and unexceptional to join relevant business networks, something that was alien to her at the outset. For future identity research, this continuous process of discourse between self and other in identity construction raises a methodological challenge, to be aware that the presence of the researcher can influence what they observe or are told. If, as Watson and Watson (2012) argue, there is an identity work component to practically every conversation, we see that in the course of interviews and conversations the participants' notions of who they are being rehearsed and developed in the dialogue of the interview.

Finally, our detailed longitudinal case study narrative makes six contributions to the emerging literature on leader identity. First, we have demonstrated the relevance of a transformative learning perspective on identity construction that sees this as an ongoing negotiated discourse. Second, we conclude that in discussing identity we should follow the thrust of the new mobilities' paradigm in social science (Sheller and Urry 2006) and focus less on states (things as they are) and more on processes (by which things come into being). Third, we move beyond the "rather thin notion" (Sveningsson and Alvesson 2003: 1165) of identity in the modernist tradition, in which identity is viewed as objective, measurable and real emphasising a static analysis to focus on the shift from the static analysis of identity to the process of identity construction. In so doing, we shift, from analysing social identity to understanding self-identity as a social construction and from identity per se to the discourse of identity work. Fourth, we extend the discussion of identity work and leader development to the entrepreneurial domain and demonstrate the relevance of both organisational and socio-cultural context to this. Fifth, the development and presentation of a thick longitudinal case narrative, within a transformative learning framework, of how identity is constructed in a complex and changing business environment provides a stimulus to this growing and productive area and a basis for the development of new theoretical and empirical knowledge. Finally, in setting out a model of the transformative learning process (Fig. 25.2), which is based on iteration around the key elements of individual experience, critical reflection, dialogue, holistic orientation, awareness of context and authentic relationships, and in demonstrating its applicability to the case analysis presented in the chapter, we have

provided a framework for the design of leader development programmes that can effectively support participants' leader identity work through an ongoing process of transformative learning.

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