

ORGANIZATIONAL GHOSTS: HOW “GHOSTLY ENCOUNTERS” ENABLE FORMER LEADERS TO INFLUENCE CURRENT ORGANIZATIONAL MEMBERS

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Leadership research has assumed that leader group prototypicality enhances leadership influence during a leader’s tenure. Other leadership research has also assumed that leaders, especially founders, can transform their leadership influence into a legacy that will survive death and departure from the organization and continue to impact followers. However, to understand the historically embedded nature of leadership influence, it is critical to unpack how specific leaders can become group prototypes and influence followers after their departure. We address this opportunity by examining *organizational ghosts*—former organizational members who become the ideal prototype of an organization’s values and identity. Drawing on qualitative data from an organizational merger, our analysis reveals that admired and adored leaders with broad exposure became embodied organizational prototypes. After organizational exit, they became organizational ghosts, institutionalized by associative learning, perpetuated practices, and physical memory work. When activated—either intentionally or organically—these ghosts had “ghostly encounters” (remembered and imagined) with remaining members that safeguarded the organization, comforted organizational members, and devalued alternative value systems. We introduce the concept of organizational ghosts, explain how leaders can become ghosts, and specify remembered and imagined encounters as mechanisms through which former leaders can have enduring influence in organizations.

Leadership is central to the study of organizations and is a key driver of organizational and institutional success (Bass & Bass, 2009; Schein, 2010; Selznick, 1957). For decades, leadership scholars have explored the antecedents and outcomes of essential concepts like leader emergence and leader effectiveness (e.g., Avolio, Walumbwa, & Weber, 2009). The social

identity theory of leadership states that individuals who represent “enduring ideals and principles” in an organizational or institutional system (Collins & Porras, 2005: 480–481; see also Kraatz, Flores, & Chandler, 2020) come to be seen as prototypical of their groups, are more likely to emerge as leaders (Van Knippenberg & Hogg, 2003), and qualify for greater influence than less prototypical peers (Bingham, Oldroyd, Thompson, Bednar, & Bunderson, 2014).

Other leadership theories suggest that leaders, especially founders, can transform their leadership influence into “a shared legacy that will survive death and departure from the institution” (Martin, 1992: 63) and continue to impact remaining organizational members (Basque & Langley, 2018; Fauchart & Gruber, 2011; Ogbonna & Harris, 2001). For leaders, the desire to establish an enduring legacy is seen as a powerful motivating force (Fox, Tost, & Wade-Benzoni, 2010). For example, Steve Jobs invested significant resources to preserve his personal legacy throughout Apple headquarters. The company has left Jobs’s office untouched since his death, and infused the

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headquarters with quotes and images from his tenure that have been described as “motivational and powerful” (Gurman, 2012). Such concerns about legacies may be relevant in any organization, but may be especially pertinent in family firms where family members are “often primarily motivated by their sense of belonging in a group that possesses the uniquely meaningful opportunity to sustain and extend a legacy of values” (Aronoff, 2004: 57).

While extant research has often treated leader group prototypicality as an ahistorical, abstract source of influence for current leaders in social groups, if we assume leader group prototypicality is historically embedded we need to explore the dynamics whereby leaders might emerge as group prototypes. Likewise, while research on the “legacy motive” has focused predominantly on current leaders establishing their own legacies, if we assume that former leaders have enduring influence after their exit we need to better understand how current organizational leaders and members are influenced by former leaders. As Colquitt, Sabey, Pfarrer, Rodell, and Hill (2023) recently argued, past research has primarily focused on the “legator” (i.e., the person leaving the legacy) while largely ignoring the “legatees” (i.e., those who inherit what has been left behind). Furthermore, an enduring legacy is often seen as a possibility for founders, yet if we assume that nonfounders can establish legacies we need to know more about the process of establishing enduring influence beyond the founding. As a result, our understanding of leader group prototypicality and leader legacies can be enhanced as we come to better understand how individuals become group prototypes and the impact they continue to have on others after their departure. For example, Apple’s current CEO Tim Cook has said that Steve Jobs’s “spirit will always be the foundation of the company. I literally think about him every day” (as cited in Colt, 2014). How did Steve Jobs become the “foundation” of Apple, and how does his presence in the minds of his successor and others influence the cognition and behavior of current leaders and employees?

Building on the social identity theory of leadership (Hogg, 2001), this study addresses this theoretical opportunity by examining *organizational ghosts*—former organizational members who become the embodied prototype of the organization’s values and identity—and their enduring influence on remaining organizational members. Our analysis of qualitative data collected in two organizations merging together shows how two former CEOs, both nonfounders, came to be admired and adored as the “creators” of

their organizations, and, as a result, came to embody the ideal prototype of their organization’s desired values and identity “in [their] own image” (Schein, 1983: 39). Individual associative memory work, perpetuated practices, and physical memory work institutionalized their values and identities into normative and structural features of the organization (Gruys, Stewart, Goodstein, Bing, & Wicks, 2008; Selznick, 1992). As a result, after their organizational exit, these “ghosts” without a physical presence could be activated deliberately or organically in the minds of organizational members and have remembered and imagined encounters that influenced remaining members in significant ways.

This study makes several important contributions to organizational research. First, while prior leadership research has suggested that leader group prototypicality enables a leader’s influence during their tenure, we explore the historical origins of leader group prototypicality and how it enables a leader’s enduring influence after organizational exit. Second, while legacy-motive research has assumed that leaders, especially founders, can create enduring legacies, we deepen our understanding of why and how some individuals, including nonfounders, successfully cultivate enduring influence. Further, we focus on those who receive or inherit a leader’s legacy, and show how the institutionalization of a leader creates the context for organizational ghosts to have future “ghostly” encounters in organizations. Finally, we illuminate different types of remembered and imagined encounters that facilitate a leader’s post-exit influence. This study expands our awareness of the cognitive interplay between current and former members and highlights important historical forces inherited by current organizational members that shape the way they think, feel, and decide.

CONCEPTUAL OVERVIEW

Leader Group Prototypicality

Scholars have developed numerous theoretical perspectives on leadership influence across multiple levels of analysis (e.g., Antonakis & Day, 2017; Denis, Langley, & Sergi, 2012; McClean, Barnes, Courtright, & Johnson, 2019; Van Knippenberg & Van Kleef, 2016), including the sociological (Kraatz, 2009; Selznick, 1957), cultural (Kunda, 2009; Schein, 2010), and interpersonal (e.g., Bass & Bass, 2009; Gardner, Lowe, Moss, Mahoney, & Coglisier, 2010). The social identity theory of leadership (Van Knippenberg, 2011; Van Knippenberg & Hogg, 2003) assumes that individuals define themselves in terms

of personal attributes (personal identities) and group memberships (social identities). Defining oneself in group terms requires “depersonalization,” or shifting one’s cognition from “I” as an autonomous actor to “we” as a group member (Hogg, 2001). The more one identifies with a particular group, the stronger the shift from “I” to “we,” and the more self-defining the social identity becomes (Hogg & Terry, 2014).

Implicit leadership theory views leader prototypes as abstract representations of effective leadership that serve as the comparator for current leaders (Cantor & Mischel, 1979; Lord & Brown, 2004; Lord, Foti, & De Vader, 1984; Lord & Maher, 1994; Rush, Thomas, & Lord, 1977). However, the social identity theory of leadership views prototypes as “fuzzy sets of attributes (perceptions, attitudes, feelings, behaviors) that ... capture the essence of the ingroup and clearly differentiate the ingroup from relevant outgroups” (Van Knippenberg & Hogg, 2003: 245). Prototypes guide group members toward group ideals and are the standard used to judge the behavior of group members (Cantor & Mischel, 1979; Van Knippenberg, 2011). Group prototypes may be based on real or hypothetical members and may capture exemplary (i.e., ideal) or typical (i.e., central tendency) (Hogg & Smith, 2007) attributes, though research has shown that the effect of leader group prototypicality on leader outcomes is stronger when the prototype is based on ideal attributes.

The social identity theory of leadership argues that leaders with greater levels of leader group prototypicality—the extent to which they are perceived as representing the group values and identity—will emerge as leaders and be more influential than less prototypical members (Bingham et al., 2014; Van Knippenberg & Hogg, 2003). Though group prototypes vary across cultures, some leadership characteristics are seen as universally positive across cultures. “Ideal leaders are expected to develop a vision, inspire others, and create a successful performance-oriented team within their organizations while behaving with honesty and integrity” (Dorfman, Javidan, Hanges, Dastmalchian, & House, 2012: 506), suggesting that individuals expect both performance and morality from leaders. This aligns with studies showing that competence and warmth are primary social judgments that “underlie the characteristics that leaders are expected to exemplify” (Lee & Fiske, 2008: 102). “Warmth” is a moral dimension focused on a person’s intentions, and characteristics such as trustworthiness, morality, empathy, and kindness. “Competence” is a performance dimension that focuses on a person’s ability and characteristics such as intelligence, power,

and skill. Research has suggested that “warmth is judged before competence, and warmth judgments carry more weight in affective and behavioral reactions” (Fiske, Cuddy, & Glick, 2007: 78). Individuals perceived as both competent and warm prompt the strongest positive emotions and elicit admiration and adoration among observing individuals in a social group (Cuddy, Fiske, & Glick, 2008).

The core assumptions of the social identity theory of leadership have been substantiated by empirical findings across a variety of research designs and samples (see Van Knippenberg, 2011). However, research in this domain has largely examined group prototypicality as an abstract concept, while ignoring the historical forces that shape perceptions of leader group prototypicality. In addition, research has focused on perceived leader effectiveness during a leader’s tenure, without explaining the ongoing influence that prototypical leaders might have after their time in a leadership role. Unpacking the origins of leader group prototypicality and its enduring impact on current members is critical because organizational exits are a constant in organizational life (e.g., job loss, retirement, death) (Hom, 2011; LaFarge & Nurick, 1993), and yet attachment between social actors may extend beyond their shared tenure (Conroy & O’Leary-Kelly, 2014; Crosina & Pratt, 2019; Shapiro, Hom, Shen, & Agarwal, 2016; Walsh & Glynn, 2008).

The Legacy Motive and Institutionalization

Legacy-motive research (Wade-Benzoni, Sondak, & Galinsky, 2010) has shown that leaders, especially founders, seek to establish a legacy: “an enduring contribution to a work unit that is ascribed to a legator, that has implications for meaning and identity ... that may influence unit functioning after the legator’s membership in the unit has ended” (Colquitt et al., 2023: 13). An individual’s perceived legacy is an important source of meaning, offering assurance that one’s work and identity may endure beyond death or exit (Fox et al., 2010). It can also affect the way leaders approach decisions. For example, scholars have found that individuals often fail to sacrifice for future generations when the current generation will not benefit from their sacrifices (Wade-Benzoni, 2002; Wade-Benzoni & Tost, 2009). However, when asked to think about their personal legacy, individuals experience stronger affinity toward, and a greater willingness to sacrifice for, future generations (Wade-Benzoni et al., 2010; Wade-Benzoni, Tost, Hernandez, & Larrick, 2012).

Prior work has also shown how founders institutionalize their legacies and create processes, structures, or value systems that enable their enduring influence (Dewey, 1925; Kraatz et al., 2020; Marquis & Tilcsik, 2013; Selznick, 1957). For example, imprinting research has shown that periods of susceptibility (e.g., founding, organizational change) allow founders to infuse personal values into an organization, creating enduring cultural and structural legacies (Johnson, 2007; Marquis & Tilcsik, 2013). In Trice and Beyer's (1986: 152) analysis of Alcoholics Anonymous, they found that the founder's values were so embedded in the organization's structures and processes that his death "seemed to have only scant effects on the ongoing activities of that organization."

Another way in which legacies may be institutionalized is through successors who sustain the processes, structures, and value systems created by the predecessor. For example, research on upper echelons theory has suggested that CEOs seek to preserve their legacy by developing successors with similar preferences who will continue their strategies and enact the leader's values, much like Steve Jobs prepared Tim Cook (Bigley & Wiersema, 2002; Hambrick, 2007; Hambrick, Geletkanycz, & Fredrickson, 1993; Hambrick & Mason, 1984; Sonnenfeld, 1986; Zajac & Westphal, 1996). Under the wrong successor, a founder's influence can unravel quickly. For example, Trice and Beyer's (1986: 151) study of the National Council of Alcoholism showed how the founder's influence was "diluted and confused" by her successor, resulting in conflict and fragmentation.

Other research has shown how leaders are institutionalized in physical, oral, or textual artifacts that transmit key values and identities to future organizational members (Schultz & Hernes, 2013). For example, socialization research has shown how new employees learn "beliefs, values, orientations, behaviors, skills, and so forth" (Ashforth & Saks, 1996: 149) through mediums including organizational history and stories of past leaders (Cable, Gino, & Staats, 2013; Dailey & Browning, 2014; Van Maanen & Schein, 1979). This type of storytelling may be particularly important in family firms (Dyer, 1986; Lansberg, 1999; Nason, Mazzelli, & Carney, 2019). Research on organizational culture and identity change has also found that "organizational history is important to any change process" (Gioia, Schultz, & Corley, 2000: 71). For example, Van Knippenberg and Hogg (2003) proposed that members resist change when they sense that defining features of the group's identity are threatened.

As a result, "leaders managing change must be 'agents of continuity'" (Venus, Stam, & Van Knippenberg, 2019: 670). For example, in their study of organizational identity change, Ravasi and Schultz (2006: 453) found that "images of an organization past—the Bauhaus heritage, the legacy of the founders, milestone products, and excerpts from old advertising campaigns—were used to give new sense to the organizational present and substantiate future aspirations."

Further, collective-memory research has highlighted how collectives construct, institutionalize, and revise artifacts to help individuals connect to a shared past (Erlil, Nünning, & Young, 2008; Olick & Robbins, 1998). Bellah, Madsen, Sullivan, Swidler, and Tipton (1985: 153) suggested that a critical part of a shared past is "examples of the men and women who have embodied and exemplified the meaning of the community." If we assume that "the history of the groups or communities to which we belong is an indispensable part of our social identities" (Zerubavel, 1996: 290), and that memory is "a central, if not the central medium through which identities are constituted" (Olick & Robbins, 1998: 13), stories of former leaders play a role in influencing the values and behavior of remaining group members. For example, several writers have examined the role of important historical leaders (e.g., Abraham Lincoln) in shaping American identity and culture (Meacham, 2022; Schwartz, 2003).

While these literatures have highlighted the legacy motive and various ways in which founders may be institutionalized and transmitted, Colquitt and colleagues (2023: 12) recently noted that research has tended to focus "on the motives and concerns that cause someone to leave a legacy," while overlooking why some successfully cultivate legacies, and how those left behind are influenced by a leader's legacy. According to collective-memory scholars Hirst and Manier (2008: 191):

A psychologist reading this [collective memory] literature cannot help being struck by how little emphasis is placed on the person who is "consuming" a mnemonic resource or "performing" a memory practice... a full appreciation of collective memory will never be achieved until the "problem of reception" is investigated.

As a result, we know surprisingly little about why and how some individuals, especially nonfounders, cultivate enduring influence, how their identities persist, and the cognitive interplay that might occur between current and former leaders that enables enduring influence after exit.

“Ghostly” Encounters

As we will show in the findings section, one way in which former leaders continue to operate in the minds of followers is through cognitive encounters—wherein individuals recollect or imagine personal or indirect experiences with former leaders. The capacity to remember unlocks “mental time travel” (Kandel, 2006: 10), enabling individuals to “go back in time” and revisit the past in ways that affect them in the present (Schacter, 1996: 17). Further, Gilbert and Wilson (2007: 1352) suggested that memories are “the building blocks of simulations” and other types of imagined and prospective activities (e.g., planning, predicting the future).

Psychologists have long recognized the importance of dialogue with the self and remembered or imagined others. For example, early symbolic interactionists like Mead (1934) saw internal dialogues as a way for individuals to anticipate outcomes of social actions. From there, scholars in various disciplines have examined the role of imagined encounters—“a process of social cognition and mental imagery in which individuals imagine and therefore indirectly experience” a departed individual as present in their current context (Honeycutt & McCann, 2017: x). These mental encounters can have effects similar to real interactions in shaping social cognition and behavior (e.g., Crisp & Turner, 2009, Honeycutt & McCann, 2017; Meleady & Crisp, 2017).

Gergen (2000: 123), called these “others who are not (or may never have been) in one’s immediate social context... with whom we silently engage” *social ghosts*. These “ghosts” can be real people—even if the two people have never met (Gergen, 2000)—or fictitious characters. “Interactions” may be proactive (e.g., rehearsing one’s approach to a future interaction; Diekmann, Tenbrunsel, & Galinsky, 2003; Hermans, 1996) or retroactive (e.g., evaluating one’s approach to a past interaction; Fazio, Effrein, & Falender, 1981; Honeycutt, Zagacki, & Edwards, 1990). They may include elements of imagined dialogue, visual imagery of the other, or simulations of what the imagined other might think, feel, or do (Rosenblatt & Meyer, 1986; Zagacki, Edwards, & Honeycutt, 1992).

Extant research has suggested that imagined encounters with social ghosts perform a variety of functions. For example, social ghosts may serve as role models and foster positive or negative feelings about the self (Gergen, 2000). Other work has shown that social ghosts play a role in bereavement, helping individuals connect with someone who has died (Boerner & Heckhausen, 2003). Research on perceptions of

outgroup members has also shown that imagined interactions can reduce prejudice and discrimination (Crisp & Turner, 2009). For example, one study found that participants who imagined positively interacting with someone facing severe mental illness improved actual interactions with someone facing severe mental illness (West, Turner, & Levita, 2015).

Despite these insights, we know surprisingly little about the emergence and function of “ghostly” encounters in organizations. Constructs like perspective-taking (Parker & Axtell, 2001) or future work selves (Strauss, Griffin, & Parker, 2012) imply cognitive engagement with imagined selves or others, and some scholars have explicitly explored imagined activity in organizations. For example, Obodaru (2017) found that individuals engage in imagined activities related to foregone jobs, and Meleady and Crisp (2017) found that imagining positive interactions with current organizational leaders strengthens organizational identification. Schinoff and Byron (2022) also theorized that imagined interactions may compensate for a lack of real interactions related to one’s work. However, despite these emerging insights, we have much to learn about the role(s) that ghosts and ghostly encounters play in influencing organizational members.

METHODS

Research Context

This study draws from field work conducted in two organizations, Edwards Brothers and Malloy Inc.,¹ which were in the early stages of merging together. Edwards Brothers was established in 1893 and Malloy in 1960, and both grew into thriving printers (i.e., book manufacturers). These organizations operated in a region of the United States called the “Short Run Book Capital of America” because of the number of printers operating there. At the time of our study, Edwards Brothers was led by CEO John Edwards and had annual sales approaching \$90 million. Malloy was led by CEO Bill Upton and had sales of over \$40 million. However, given the declining demand for book printing, and increasing pension obligations, the companies announced a merger to increase their competitive position. The resulting company, Edwards Brothers Malloy, became the sixth-largest book printer in the United States. John Edwards retained the title of CEO and Bill Upton assumed the role of COO. Six years after merging,

¹ Permission to use the names of the organizations was granted by Edwards Brothers Malloy CEO, John Edwards.

Edwards Brothers Malloy went out of business. Though these rival family businesses had deeply intertwined histories, their unique cultures made the merger painful for both organizations. The older, larger, and more profitable Edwards Brothers emphasized profitability and efficiency; it was a family business with greater emphasis on “business.” In contrast, Malloy, as a family business, emphasized innovation, and was proud of its family-like culture. During our study, both organizations were finalizing details of the merger, and beginning the process of integration.

Data Collection

Our study began with a more general research question, seeking to understand how these organizations preserved and transmitted the memories of former members and why this preservation and transmission was significant. Our aim was to capture the subjective perspectives of informants through an interpretivist lens, so we utilized an inductive, qualitative study design to explore our research questions (Morgan & Smircich, 1980). Each organization had operated for several decades and had experienced CEO and other employee turnover, and so we felt these family businesses would be ideal contexts from which to draw samples where our phenomena of interest would be readily observable (Locke, 2001; Patton, 2002).

We collected three types of data for this study. First, during an eight-month period we conducted nonparticipant observation, learning the histories and values of each organization and exploring how individuals viewed their company, their leaders, and the merger. In total, we spent 21 days and one night onsite, with visits ranging from two to eight hours. The majority of these visits occurred during a four-month period. This time in “the field” (Douglas, 1976) enabled deep acquaintance with the organizations through the lens of their members (Rosen, 1991; Van Maanen, 2011). In our time at each facility, we learned about the process of book manufacturing, attended employee appreciation days and sales meetings, and captured reactions to the merger. We noted properties and patterns of places and people, and examined physical artifacts such as portraits or plaques commemorating former members (see Appendix A). Immersion also allowed for dozens of impromptu interactions with customers, workers, and leaders that were not formally transcribed, but offered valuable context in our pursuit of “thick description” (Lincoln & Guba, 1985).

Second, to identify former employees seen as significant to each organization’s history, we examined corporate histories published to celebrate major company anniversaries. For each name mentioned in the corporate history, we recorded their identities and accomplishments. There were seven individuals named in the official history of Edwards Brothers who had left the organization: the two founders, the first outside salesperson, and the four former CEOs. There were five individuals named in the official history of Malloy who had left the organization: two founders, one investor, one former CEO, and a consultant. We also examined media announcements and company newsletters published following the merger of Edwards Brothers and Malloy.

Third, we collected “native views” of each organization’s history through semi-structured interviews (Gregory, 1983). The term “native” refers to the informant, and the goal was to “grasp the ‘native’s’ point of view, [their] relation to life, to realize [their] vision of his world” (Malinowski, 1922: 25). To explore how memories of past members were preserved and transmitted, we purposefully sampled informants across all levels of the organization (executive, manufacturing, and support functions) whose tenure and experience would offer relevant perspectives (Locke, 2001). As our initial interviews unfolded, we identified other individuals whose experience was important to help us better understand the history of these organizations. Using a semi-structured interview protocol (Whyte, 1984), we gathered native views of Edwards Brothers’s history from 20 current employees, and native views of Malloy’s history from 20 current employees. For more context, we also held two interviews with former Malloy CEO Herb Upton and one with the first employee of Malloy, who had been retired for many years.

To gather these histories, each informant was shown a blank timeline that had the name of their organization and an arrow running left to right, with the phrase “Time 0” anchored on the left. Informants were asked to start at Time 0 and describe defining moments and characters in the organization’s history. We discussed why each character named was important, how their memory was preserved, and how this person continued to influence the interviewee and the organization. The goal of each interview was to carefully listen to each informant, understand their perspective, and expand upon emergent insights (Spradley, 1979). Interviews ranged from 35 to 75 minutes, with most lasting about one hour. Interviews were transcribed for subsequent analysis.

As noted, our initial question sought to understand how organizations preserved and transmitted the memories of former members and why this process of historical preservation was significant. Interviews were conducted in multiple waves in order to pause and take stock of high-level emerging themes. We reached a point where new interviews did not appear to be generating new themes, or deepening insights about existing themes (Locke, 2001), at which we believed we had reached theoretical saturation (Charmaz, 2006).

Inductive Data Analysis

We followed principles of inductive, qualitative analysis in our approach to data analysis (Locke, 2001). As often happens in inductive work, we did not enter the field with an *a priori* focus on “organizational ghosts”; rather, the topic emerged organically in the context and through our analysis (Charmaz, 2006; Glaser, 1992). Our analysis took place in several phases and consisted of various analytical “moves” between data and theory (Grodal, Anteby, & Holm, 2021).

In the first phase of analysis, we built a list of members named in the native organizational histories. Our analysis revealed 62 former members of Edwards Brothers and 44 former members of Malloy named as significant characters in their respective organization’s history. We pooled data about each person from field notes, corporate histories, and interviews, to better understand why these people were remembered and how they continued to influence remaining members. Creating a summary for each individual helped bound and organize our data (Corbin & Strauss, 1990; Miles & Huberman, 1994). We reviewed these summaries and interview transcripts and engaged in open coding in a line-by-line fashion (Goulding, 2001; Locke, 2001), seeking to show the data on their own terms, recognize and avoid bias or inference, and explore emerging patterns (Locke, Golden-Biddle, & Feldman, 2008). Both authors engaged in this process, meeting regularly to hone conceptualizations, while remaining open to emerging themes (Glaser, 1992).

Coding revealed that two individuals—Herb Upton and Martin “Marty” Edwards—were mentioned by all informants. In addition, informants referred to Herb and Marty more frequently and with greater detail and emotional intensity than other historical figures. Herb and Marty appeared to be the organizational prototype in their respective organization, and the standard used for evaluating other leaders. As a result, we focused our analysis on these two leaders to better understand how they became the ideal

prototype in their respective organizations. We identified two factors driving this process: (a) the exposure created by their role visibility and extensive tenures; and (c) their followers’ admiration and adoration, due to their perceived competence in driving organizational success and their perceived warmth and devotion to their employees.

After the completion of open coding, focused coding revealed that some informants described former members as “ghosts” (Charmaz, 2006). For example, CEO John Edwards said of his father, former CEO Marty Edwards, “To me, his ghost is in the hallway” (42, EB²). Similarly, an employee who created a post-merger “History” section on the company website said, “I now see the ghosts in this organization.” We also saw that informants appeared to cognitively engage with Herb and Marty, remembering important interactions, seeking Herb or Marty’s approval, or imagining how they might think, feel, or behave. These discoveries prompted a search for research using the term “ghosts” (e.g., MacAulay, Yue, & Thurlow, 2010; Orr, 2014). We discovered Gergen’s (2000) work about cognitive engagement with “social ghosts” not in the immediate context. The “ghosts” of Herb and Marty were remembered from personal or indirect encounters, or imagined as present in their social context. This also led us to literature on imagined interaction, which helped us conceptualize these cognitive encounters more specifically as “ghostly encounters.”

Due to the breadth of informants’ memories and reflections about Herb and Marty, and the perceived impact of these individuals both personally and organizationally, we perceived that these individuals were more than just “social ghosts.” This led us to engage in theoretical coding, connecting ways our informants described encounters with these ghosts to relevant explanations in the literature (Charmaz, 2006; Locke, 2001). We found that Herb and Marty remained the ideal prototypes of the values and identity of their respective organization despite their organizational exit. Accordingly, following our informants’ interpretive views (Morgan & Smircich, 1980), we came to categorize Herb and Marty as *organizational ghosts*, which we define as former organizational members who are perceived as the embodied prototype of the organization’s values and identity.

² This notation identifies the origin company for each informant. This notation indicates a unique identifier for each informant and their original employer. EB = Edwards Brothers. M = Malloy.

We also noted that Herb and Marty were remembered or imagined organically in association with certain aspects of their organizations. We classified this part of the process as “associative learning.” We also noted practices tied to these individuals that had endured after their exit. We categorized these as “perpetuated practices.” Further, we saw artifacts that were intentionally created in the image of Herb and Marty, which we came to classify this as “physical memory work.” We found that these ghosts were activated in two unique ways. When their activation was deliberate, we classified it as a “summoning”; when it was organic, we classified it as an “appearance.” Finally, we saw that activating these ghosts stimulated remembered and imagined encounters with remaining members, and used the labels “safeguarding,” “comforting,” and “devaluing” to describe the main functions of these ghostly encounters. Throughout the analytical process, we tried various theoretical frames and iteratively built conceptual models to illustrate our emergent theory (Locke, 2001). Our analysis resulted in the conceptual model seen in Figure 1.

FINDINGS

We begin by describing Herb Upton and Marty Edwards, the former leaders named by each current member as significant in their respective organization’s history. We show how these leaders came to be

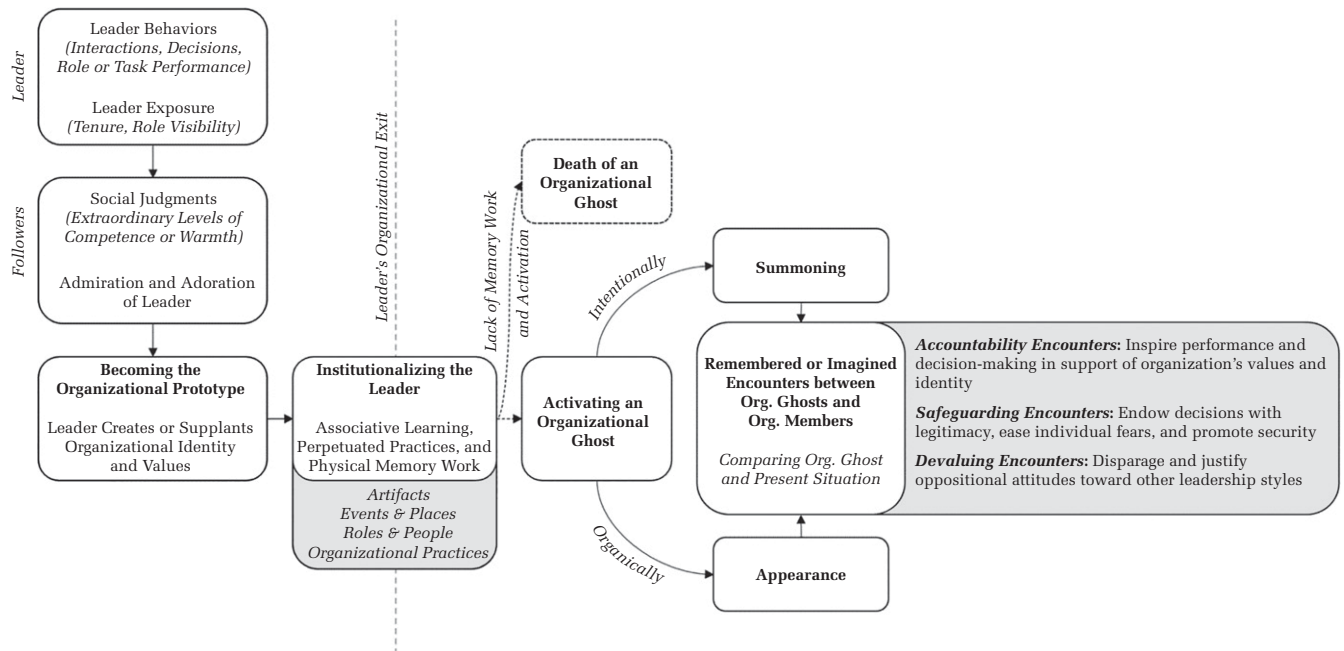
seen as the prototype of their respective organization, and how they were institutionalized into the physical and social fabric of their organization, enabling them to emerge as ghosts after exit. We then show how these ghosts were activated cognitively, deliberately, or organically, facilitating remembered and imagined ghostly encounters. Finally, we unpack distinct types of comparisons that continue to impact the thoughts, feelings, and actions of current leaders and members. In sum, we show how leaders qualify to become ghosts, how they are institutionalized and then activated cognitively after organizational exit, and how they continue to influence remaining members.

Becoming the Ideal Leadership Prototype

Herb Upton’s leadership. As our study began, Herb Upton was 87 years old and had retired 15 years prior. Herb bought Malloy from founder Jim Malloy in 1960, led as CEO for almost 40 years, and was succeeded by his son, Bill. Herb believed profits were a function of creating a loyal customer base and a harmonious workforce. Stories of Herb’s relentless pursuit of customer satisfaction were pervasive in the organization. One informant shared:

Herb gets the press supervisor, the bindery supervisor, and they drive down to have a meeting with this customer face to face... That’s how customer-oriented

FIGURE 1
Model of the Emergence and Enduring Influence of Organizational Ghosts



Herb is. He would literally get in his car and drive several hours to meet up with a customer. (14, M)

Herb devoted the same relentless attention to creating a family-like atmosphere. According to Herb's son Bill, "I don't think this company was ever about making money, it was to provide a place for people to have a good job" (4, M). Herb modeled the value of individualized consideration. Employees often spoke about Herb with reverence and emotion, sometimes weeping as they reflected on his influence. He was known for learning the names of each employee. One employee recalled, "Very nice man. He would know everyone's name in the plant, from front door to shipping door. He would know everybody" (20, M). Another employee remembered:

You talk to people who have been here for 25 years, 20 years, and they love him. And, it's because he cared about them. ...At one point we had 420 employees, so if you had an employee appreciation night, he [could] stand there and could name them all by name...and chances are he knew spouses by name, and knew kids' names. (11, M)

Herb was also known for responding with compassion to employee challenges. One employee lauded how Herb had saved him from alcoholism. He said, "Herb being the type of guy he is, saw the good in me. So I did get help. And now, I am better than I have ever been. I have been clean and sober since 1986" (9, M). Another employee recalled:

[Herb] would walk around and everybody's story was important to him. He was a great listener. He was a great man to give advice. I remember one time, I was struggling and he didn't even know me for a year and he lent me some money, which I paid back. He used to call me [Tom], he said, "[Tom], I knew you would pay me back." That struck me [as] kind of heavy because I had only been here six months so for him to do that I really appreciated that. I think that shows some of his greatness or his kindness I should say for people. I think he is a great guy. I respect him to today. I think he is top of the line. Great guy. (19, M)

These stories about Herb's compassion pervaded the organization, illustrating the depth of his commitment to this core organizational value.

Another value Herb instilled in Malloy was participatory management. Herb authorized small groups of leaders and line workers to create projects to improve plant efficiency. When purchasing new equipment, Herb had press operators conduct the research—even traveling to suppliers in other

countries—rather than telling them what they should do. One employee said:

So a lot of the decisions we made were considered, well-organized, sometimes frustrating because they were so slow in coming, but he wanted to make sure that not only did we study and know what we were getting ourselves into before we made a decision, but that everyone felt like they participated in that decision. And that's a legacy or a characteristic of his management style that is really important. (10, M)

Another executive said, "He valued the importance of multiple perspectives. In a sense that he didn't have all the answers and it was important to get input. And it was important to have consensus on the big decisions" (11, M). Participatory management helped individuals feel valued and a part of the Malloy "family."

Herb also embodied the values of modesty and personal sacrifice. One employee said Herb has "been very self-sacrificing, and all the money has gone back into the company" (1, M). An executive called this "a form of self-denial" (4, M) that included taking a modest salary, having a humble office, and driving used cars. One employee said Herb drove an old Chevy or a minivan "until the wheels fell off" (10, M). Several informants described Herb's office as "austere, plain vanilla" and "nothing very fancy" (9, M), and that he "[used] the same desk ... for 30 or 40 years" (13, M). Each Christmas, employees would give Herb money to purchase himself a gift, but he would always refuse:

Herb does not really like the limelight, he doesn't really like recognition or attention. And every year we would have a Christmas party and we would collect money and give it to Herb. And we'd ask him to buy something with it. Well, for a while we would buy him something and give it to him, and then they would start giving him money and tell him to buy something with it. But Herb never wanted that. He wanted the money to be used for the employees. So what we eventually started doing was, and Bill carried it on, but we would collect the money and then ask the employees what they wanted to do with Herb's Christmas money, and they put windows in the bindery, they bought a new flagpole and a new flag [and] other improvements ... that's just the type of people they are. (1, M)

These self-sacrificial behaviors reinforced one of Herb's sayings: "This is a family business, but the family serves the business, the business doesn't serve the family" (4, M).

Becoming the ideal prototype at Malloy. Informants from Malloy admired and adored Herb and conveyed a high degree of active attachment to him. Herb was often referred to using phrases such as the “main character” (3, 17, M), the “big character” (6, M), and the “primary driver” (18, M), in the story of Malloy. One executive said, “people appreciated Herb’s attitude and the culture that he created. There’s an indescribable culture that was built up because of Herb’s personality, and that lives on” (1, M). Another employee said, “the goodness of Malloy is the goodness of Herb” (11, M). Our analysis revealed that Herb was seen as the ideal prototype at Malloy, and the embodiment of Malloy’s values and identity. For example, a Malloy employee said:

Herb is, to a lot of people, Malloy ... [Herb] was the figurehead. Even though he was not active in the day to day of Malloy. He would still be the person you think of when you thought of Malloy ... to me [it] was Herb. (20, M)

The irony of this quote is that Malloy is the last name of the organization’s founder, Jim Malloy; it is akin to saying, “When you think of Disney, you think of Bob Iger.” It shows how intertwined Herb had become with the essence of Malloy. Similarly, one executive described Herb as “the George Washington of Malloy” (1, M). Likening Herb to this influential U.S. president shows the importance of Herb in the story of Malloy and his stature in employees’ minds. This executive noted that everyone at Malloy had “profound respect for Herb ... he did everything right.” (1, M). Though Herb was not the founder of Malloy, he became cognitively *more* significant than its founder and was seen as the creator, embodiment, and prototype of Malloy’s values and identity.

Martin “Marty” Edwards’s leadership. Marty Edwards joined Edwards Brothers in 1954, and served as CEO from 1979 until he retired in 1997 and his son John Edwards became CEO. After battling cancer, Marty died in 2006. He was named a key character in the story of Edwards Brothers by every informant. Marty was described using phrases like “hard but fair” (33, EB), “like a grandfather” (23, EB), “a good man” (23, EB), “conservative” (24, EB), “family-oriented” (33, EB), “high-tempered” (36, EB), and “strong leader” (27, EB). One employee described Marty as having a “a good balance and although he was very employee-focused ... business was business” (41, EB). Marty valued conservative, analytical decision-making with an intense focus on the “bottom line.” Marty’s son Jim, an executive, said Marty was

not innovative, but a “polish-the-apple,” “sharpen-the-saw,” “keep doing what we are doing” kind of leader. He further described his father’s style as slow, thoughtful and disciplined. One employee said:

His legacy is conservative. He wanted people to put their nose to the grindstone and do an honest day’s work. He was probably less open than John about things, but ... that generation of management was that way. Just, “This is the job. Do it. It is okay if you have questions, but you [probably don’t] need to ask,” was his management style. (24, EB)

Marty presided over the company during a competitive era, and was unafraid of difficult decisions such as scaling back healthcare benefits and pension promises. He also felt a strong sense of responsibility to keep expenses low to increase profit margins. His son Jim said:

How does he live on here? I mean he touched every part of this building. Every part. Things would just tick him off that we are doing now. I mean spending \$40 on the painting right there. That would just tick him off, no reason to spend 40 bucks. I remember he got mad once [because] I took a business card and wrote something on the back to give to someone ... “Don’t waste business cards.” That stuff ... he was just frugal. (30, EB).

Marty’s concern for the organization sometimes manifested through a strong temper. One informant recalled an exchange he observed between Marty and an employee in a human resources (HR) review:

[Marty] got mad at Socks [a former employee] once because the HR book was out of order ... And he picked up the book and threw it right at Socks, and we’re talking about a binder that thick and the whole length of the table, and Socks sees it coming and he goes flying back! But that’s kind of the stuff he would do ... he was high-tempered. (36, EB)

Despite his high temper, Marty was also known for caring about employees. As his son described, “He may bust your chops, but nobody cared more” (30, EB). One hourly employee said:

He knew your name right away, a lot of people working at this press. I’d remember him standing at the front door at Christmas time as you were leaving, shaking your hand, calling you by your name. So, there was the personal touch. (25, EB)

A current manager described meeting Marty after the manager was hired: “he was very nice when I had that meeting with him ... companies that I worked for before were not that personable”

(27, EB). Another manager came to work sunburned when Marty was being treated for skin cancer. He said:

[Marty] chewed my ass out for being sun burnt ... man he just gave me the ride ... he was just showing me his [cancer], you know, "You wanna end up like this?" ... He cared about people ... reminded me a lot of my dad. He was pretty hard-core. (33, EB)

Another employee noted that Marty was "like a grandfather" and "very loving." He said, "I still remember Marty coming out, every day, talking to people. Marty made it a point later, especially in his later years, to make sure [to] come out and talk, but he was that way anyway" (25, EB). Under Marty's leadership, Marty grew Edwards Brothers to over 100 million USD in sales. He created a disciplined but loving culture that valued the business, but also the people.

Becoming the ideal prototype at Edwards Brothers. Our analysis also showed that Marty was perceived as the embodiment of the Edwards Brothers prototype. One employee said:

He really made Edwards Brothers what it was when he passed it on to John, and probably the same for Herb. I mean not that his brother didn't try but it was such in its infancy at that time and then Marty really put in all the hard work to try and make it. So that's probably why he does mean something because really he *is* Edwards Brothers. (40, EB)

Note the present tense in the above expression: "he *is* Edwards Brothers." Another employee said, "This was *his* company. He owned it, and he still owns it" (23, EB). The imagery of Marty "still [owning]" the company despite his death reveals his significance in the mind of this employee. Similarly, another Edwards Brothers employee invoked the metaphor of a family in describing Marty: "Marty is the head of the family. [Interviewer: Even though he's gone?] It doesn't matter. He will be the head of the family until the people that are here don't remember him anymore." (41, EB)

Further, one employee at Edwards Brothers cautiously said of Marty:

I don't know if he is like our ... I don't want to say it ... like our Jesus, right? Like he's the one that—because really the company became what it is during his presidency. He really made Edwards Brothers what it was when he passed it on to John. (40, EB)

Calling Marty as "our Jesus" may seem extreme, but the context suggests that Edwards Brothers

became what it is because of Marty, and Marty embodied the organization's values and identity.

The importance of both Marty and Herb to their respective companies was perhaps summarized best by an Edwards Brothers employee in the manufacturing process. He said:

I think it is the same reason why Americans look toward our founding fathers. I think obviously, these two guys are considered founders, even though they had people before him, but I think these two companies really look to these two guys as forefathers, founders. And some of their philosophies ... I think if we go back to those founding ideals and philosophies, the world would be a better place. (31, EB)

Like Herb at Malloy, Marty became cognitively *more* significant than the founders of Edwards Brothers, and was seen as the creator and embodiment of the organization's identity and values.

Why Herb and Marty? While founders are proposed to be in the best position to become ideal prototypes, we found that Herb and Marty—both nonfounders—became the group prototype in their respective organization. Our findings suggest several factors that contributed to this enduring influence. First, both individuals enjoyed major exposure to others, enabling their influence to be felt throughout the organization. Longer tenure affords opportunities to generate contact with a broader array of organizational members. Marty worked in multiple roles at Edwards Brothers for 43 years, while Herb was the CEO of Malloy for nearly 40 years. In addition, the average tenure of employees at both organizations was strikingly long. At Edwards Brothers, the average tenure of the current employees was over 10 years; at Malloy, the average tenure of the company's customer service staff exceeded 25 years. One employee in customer support said, "Because some of those customers have been here with Malloy for that long, these are people that you've had really long relationships with. So you can reminisce" (14, M). Notice how tenure is connected in this quote to the ability to "reminisce." Another Malloy informant said:

People have been through a lot together. When you work together that closely for that long ... and you see people work through [challenges] and people are there for them. You've all been through a lot together, and it's like a big family, and there are people here that are probably closer to each other than they are to their own family. (1, M).

Note the connection between the length of tenure and the perceived closeness of individuals.

TABLE 1
Becoming the Leadership Prototype: Additional Evidence

Leader	Herb Upton (<i>Malloy</i>)	Martin "Marty" Edwards (<i>Edwards Brothers</i>)
Becoming the leadership prototype	<ul style="list-style-type: none"> • "I don't know if you are familiar with a level 5 leader. Herb is a level 5 leader." (1, M) • "There are several people that have been here a while and their faces help represent the history of Malloy ... I think the biggest one for me is Herb Upton ... I guess [he's] a superstar or something, I'm interested in whatever he has to say. That's the first one that came to my mind, I'm like, 'Herb Upton definitely.' ... [the] other people [are] kind of afterthoughts." (15, M) • "Herb Upton hands down probably one of the (informant chokes up) ... I get choked up now but we all love to work for Herb." (5, M) 	<ul style="list-style-type: none"> • "A lot of the things [Marty] did, we still do today. You see these pictures on the wall and time line and stuff that they have over there. It was important for the time, making certain decisions. They are still living by that." (23, EB) • "I guess when I think about people like [Marty] in the time that they have grown and the things they have gone through in their life, I can only think that made these guys have an extremely good character. I would rather listen and see what these guys thought about stuff than the people today." (31, EB) • "I believe that they were the guys that built the companies. Even after his father or his brothers ... built their company, Marty and his family built the company and I think they were kind of the patriarchs, the ones that started it all, the ones that kept it going, the ones that got it built up." (27, EB)

In addition, certain roles naturally grant greater exposure because of their visibility. CEOs and executives, by virtue of their position in the hierarchy, naturally have high visibility across multiple departments in the organization. Marty served as CEO of Edwards Brothers for 18 years, while Herb served as CEO of Malloy for almost 40 years. Thus, we can expect individuals with long tenure or visible roles to be more likely to become prototypical in an organization. This advantage in direct exposure may translate into more indirect exposure after the individual has left, as there are more people who can remember and share specific episodes involving the individual.

Second, judgments of competence and warmth, which facilitate feelings of admiration and adoration (Cuddy et al., 2008), played a role in Marty and Herb being seen as prototypical. When asked why people are remembered at Edwards Brothers, one employee said:

They know how to relate to people easily, they're not intimidating; they have a proven success within their career and like to share and grow others. I think that people migrate to people who are like that. I think those are the people that I feel stand out for this organization. The people who really care, they are knowledgeable and want to continue to grow the business and have that demeanor. (32, EB)

Notice the emphasis on being able to relate to others (i.e., warmth) and proven success (i.e., competence). Both Herb and Marty were seen as the cause of their

organization's current state of success, a significant attribution of competence reflected in previously reported statements such as "He really made Edwards Brothers what it was" (40, EB), or, "He started it, built it, pushed it, and kept it true to his vision" (8, M). As these leaders were viewed as the "makers," "starters," and "builders" of their organizations, they supplanted the founders as the primary ghosts.

Furthermore, many of the stories about their leadership focused on knowing employee names, and their attention to individual employees. One Edwards Brothers executive said,

I think the connection that John and Marty have made with the people on the floor is something that cannot be duplicated. They have a marvelous ability to connect with people. They remember names, so they can walk by others and say, "Hello Tim, how you doing?" And that means a lot to people. It's a real skill that they've been able to develop. And they are down to earth. And I don't know that Joe [Marty's brother] was [like this] as much. (34, EB)

Note the assumption that Marty's ability to connect with others was "marvelous" and "cannot be duplicated." Interestingly, at the end of this quote, the employee compared Marty to Marty's brother Joe, also a former CEO, who was rarely mentioned in our interviews. A Malloy employee noted:

An honorable legacy is if you have a standing moral platform. And you decide that this is the way you are going to run your company. It is going to be run

TABLE 2
Social Judgements Leading to Prototypicality: Additional Evidence

Leader	Herb Upton (<i>Malloy</i>)	Martin “Marty” Edwards (<i>Edwards Brothers</i>)
Competence	<ul style="list-style-type: none"> • “Herb is definitely a main character and helped develop everything since I’ve been here and in later years, maybe since the early 90s, that helped us get to where we were.” (3, M) • “Great business guy. Just the way he took this company from a little room, maybe two machines to now with hundreds of customers.” (13, M) • “It all begins with Herb. He was able to do the things that could get this thing going. And he was an excellent salesman in my view. Herb was ... he could just sell Eskimos three refrigerators. He was just charming ... I think of Herb, if you are going to play, if Herb was a good chess player ... he would be seven or eight moves ahead of you. And I always thought of him in that light, how he seems to do that when the rest of us couldn’t see the forest [for] the trees. Because of him, we are where we are.” (9, M) 	<ul style="list-style-type: none"> • “That was also huge for this company ... not just leadership in people, but in business decisions that are made—it has really taken the company to a new level.” (32, EB) • “Marty did a really good job managing the company. When he was running the company, it seemed really lucrative and growing.” (27, EB) • “The ability to make money has changed drastically in the last 20 years, and more so the last 10, and so adjustments had to be made, and I’m kind of glad that they made the adjustments ... I might not like them all, I might not agree with them all, but they kept the doors open ... And when you see that, he [Marty] was ahead of his time I guess, is what it boils down to.” (26, EB)
Warmth	<ul style="list-style-type: none"> • “Herb could walk through on any shift and know your name. he could go through and say hi to each one of his employees. My nickname is [Junie] and he would come through and say ‘Hi [Junie].’ Anyways, I think it is nice to be able to have a boss that can look you in the eyes and say, ‘Good morning, Junie.’” (2, M) • “[Herb] is a great listener ... He always thought about his employees ... he always wanted the best for us. He was the guy who would call and stick his neck around. He listens to people. He would walk around and everybody’s story was important to him.” (19, M) • “This place has always revolved around family and being there for each other. I think that’s what rubbed off from Herb to Malloy.” (13, M) 	<ul style="list-style-type: none"> • “He was in the service, had a bit of military life, but he was also very fair responding to people ... he was a good man. Very caring person.” (23, EB) • “[Marty was] a very nice guy, ‘How are you? How are you doing?’ That kind of stuff. And that kind of hits home with me because I come from a big family too and we’re all really tight, we try to treat people with respect and take care of the important things. So that’s kind of what I like about the company, the family-orientation and I can say that’s where I came from so it’s easy for me to like that.” (27, EB) • “I was like, ‘Why does Marty know my name? Why did he know who I am?’ And then someone told me, ‘Oh he knows everybody’s name.’ He makes it a point to know.” (40, EB)
Exposure	<ul style="list-style-type: none"> • “A lot of people, even if they’ve been here for 15 years, really don’t know him. They know who Herb is, and they know who I am, but they didn’t really work with him, but you talk to people who have been here for 25 years, 20 years, and they love him.” (12, M) • “Herb’s legacy is definitely with the older crowd. I haven’t even tried to speak to him, I just go and shake his hand and I don’t know what to say, I mean ‘How are you’ and he says ‘good.’ I mean he’s old and he’s just getting by, but the people who were here I think, 15-plus years were around long enough or happened to be here long enough where he was still roaming the plant, and he would strike up conversations with operators so I think those people still in their mind he’s still, pretty much president, but not so much in the newer guys.” (16, M) • “People who’ve been here long enough they always know Herb very well and they will tell jokes and stuff like that.” (17, M) 	<ul style="list-style-type: none"> • “When you don’t see somebody face to face then you don’t have that interaction with them. As much as you might say, ‘Oh I hear this was a good man,’ I hear people saying, ‘I know that man, this was a good man’ you have to have that. What they will have is, if they stay here 20 years hopefully is how I feel about Marty, they’ll feel about John.” (41, EB) • “The key figures are the people we have seen and have worked under. Like Marty and John. I think even the people that [have been here] longer than me, Marty was around with them, so I don’t know if anybody knows anyone before him here. So those are really the key guys.” (31, EB)

according to your moral platform. The one thing here about how they treat you is with respect. [Herb] created a unique entity that managed to convey their moral platform. They didn't compromise it and they didn't sell it out. (8, M)

Overall, Herb and Marty came to be seen as extraordinarily competent and warm. They were admired and adored and came to be viewed as the creators of their organizations, and, as a result, they were able to emerge as the group prototype in their respective organizations.

Institutionalizing the Leader

Though Marty and Herb had left Edwards Brothers and Malloy, they both "lived on" within the respective organization after their departure. Speaking of Marty and his wife, one current employee said: "They're remembered. I would say there probably isn't a day when someone doesn't mention their name. And it's been maybe four or five years since they passed. They are still talked about quite a bit" (32, EB).

Three key mechanisms enabled these prototypical leaders to be institutionalized and live on in the minds of remaining members after their departure. First, our analysis revealed that informants made links between elements of their physical and social environment and particular leaders through *associative learning*. For example, a Malloy employee said of Herb Upton:

One thing I think about that makes you think of Herb is his office, he has his own special office that actually still to this day, you know he's not really in here very much at all anymore ... he's retired, but it still remains his office, no one touches it. (13, M)

Another employee described how items bought with Herb's Christmas money become tied to Herb: "A lot of things [in the plant] Herb instigated getting, and we know that so sometimes if you look at some of the equipment or if you look at, decorating the tree outside, the Christmas tree, you think of Herb" (6, M).

Further, another employee at Malloy identified artifacts that reminded him of Herb:

If you ever stand in the pressroom and look down through the pressroom down through the hallway down through the bindery you'll see on the wall it says Malloy. Somebody had that painted on the wall years ago. Whenever I see that word Malloy painted on the wall, ... what I think about is Herb Upton. (9, M)

As noted above, Malloy is the last name of the founder, but the name Malloy had instead become

deeply associated with Herb. Further, as Herb Upton and Marty Edwards were succeeded by their sons (Bill Upton and John Edwards, respectively), the sight of Bill and John prompted employees to think of their fathers. One Edwards Brothers employee said, "I guess when I see John, I think of Marty" (31, EB). Associative learning thus made links between the leaders and organizational features.

Second, Herb and Marty's leadership became taken for granted as "the way we do things around here," resulting in *perpetuated practices* that endured after their departure. According to one Malloy informant, "when something is done, you think about how Herb would've done it" (6, M). For example, Herb's practice of knowing names continued with his son Bill and other employees. One worker said of Bill: "Always nice, says 'hi [Jane].' When you get up in management it is kind of nice to know everyone by name. I know that is always a good thing and not everyone does that" (15, M). Herb's participative leadership style and self-sacrifice also continued with his son Bill and other executives who drove modest cars and sacrificed for the organization. One employee said, "You go out and look at Bill's car, do you know what Bill drives? A minivan, and it is getting rusted out. They all drive used cars" (8, M). At Edwards Brothers, John also continued many of Marty's practices, such as having an open-door policy, walking around the plant to engage with employees, and hosting a Christmas lunch for employees with 25 years of service. When asked how Marty influenced John's leadership, one informant said, "He still does a walk through the plant maybe once a day, about 11:30 and he would either wave or stop by and ask how things are going. I think that personal touch, trying not to act like he's a bigwig, [is important]" (25, EB). Thus, these routinized practices further institutionalized Herb and Marty into their organizations.

Third, both organizations engaged in intentional acts of *physical memory work* by creating and circulating physical artifacts representing Herb or Marty. For example, after Marty's death, employees came to the executives and offered to create a book of memories of Marty and to purchase a tree with a plaque that would stand at the entrance of the Edwards Brothers facility (see Appendix A). An executive explained that the employees bought a flowering tree "to represent the strength of a tree which was Marty, but the softness of the flower which was [Marty's wife]" (32, EB). One employee noted: "that's not just landscaping to us" (41, EB). Further, Marty's image is displayed prominently in the building. In the main reception area, there are portraits of

three former CEOs: Marty, his father “JW,” and his brother Joe. In both the administrative offices and manufacturing area, there are glass timelines on the wall. The timelines were created during John Edwards’ tenure and begin with a picture of the two founding brothers (Thomas, Daniel) and their brother John, the second CEO. Pictures of JW, Joseph, and Marty mark the dates when they each became CEO. Because of the timelines’ placement, employees and outsiders constantly pass by them.

There were fewer artifacts created to represent Herb at Malloy, and most reminders of Herb emerged organically through associative learning. However, they did have “Herb Posters”: life-sized, cardboard cutouts of Herb that were displayed throughout the plant. According to one executive, Herb Posters were placed in high-traffic areas and showed Herb “holding a piece of paper, and we’d put some financial results and a summary of things that are going on, things we need to be working on or improving” (18, M). Interchangeable faces signaled the financial results: Herb’s smiling face for good news and a stern face for bad news. One executive noted:

Up until the merger, every month, we would put up a kind of monthly report that I would write and put up on what we called the Herb Posters ... We used those Herb Posters for over 15 years. So that was a constant reminder to people of Herb. (18, M)

The organization also relied heavily on a report nicknamed the “Super Herb” that showed progress toward the organization’s financial goals (3, M). These artifacts associated with Herb further institutionalized Herb’s way of doing business into the practices and culture of the organization.

Beyond the physical memory work focused on Marty and Herb, the general process of historical preservation enabled stories of Herb and Marty to be shared with future generations to “keep the lasting memories alive” (9, M). Newsletters, history sections on websites, anniversary celebrations, and commemorative books or artifacts preserved and facilitated the transmission of important historical memories. As a Malloy employee said:

Occasionally we’ll be in setting where we’re in a room with a bunch of people who have been here for a long time. After the merger we had one of those with the customer support groups. Herb knew everyone’s name, always went up and said hi to them. Recently someone said “I remember Herb coming up to me and saying hi and knowing my name.” And I turned to the guy next to me and said “Who the heck is that guy?” (4, M)

Note how this interaction between “long-timers” triggered a story about Herb. An Edwards Brothers employee said, “their names still live on even though they quit and moved on” (32, EB), and a Malloy employee noted “It is like they can still be here” (2, M). Thus, through associative memory work, perpetuated practices, and physical memory work, Herb and Marty and their values were institutionalized into their organizations, enabling them to become organizational ghosts who were actively involved in the minds and hearts of remaining members even after their exit.

Activation and Types of Encounters with Organizational Ghosts

We found that as Herb and Marty became the ideal prototype and were institutionalized in their organizations, they could be “activated” for cognitive encounters after their departure. These cognitive encounters included *remembered encounters* of actual experiences with Herb and Marty, but also included *imagined encounters*, simulating how Herb or Marty might think, feel, or behave in a present situation. In both types of ghostly encounters, individuals used the remembered or imagined episode with the ghost as a comparator for their personal actions or the actions of others. In some cases, organizational members intentionally *summoned* the organizational ghost to the mind of another current member to encourage comparisons with the remembered or imagined actions of the organizational ghost. In other cases, organizational ghosts would spontaneously *appear* in the mind of a current member, prompting comparisons with the remembered or imagined actions of the ghost (for examples, see Table 4). The consistency or discrepancy sparked by these summonings or appearances had important implications within the organization.

Type 1: Safeguarding encounters. First, ghostly encounters with Herb and Marty reminded individuals of their accountability to the organization’s values and identity. Remembering or imagining the actions of Herb or Marty helped individuals consider the appropriateness of their current decisions or level of performance. The comparisons involved in these cognitive encounters transformed current employees from agents to stewards and promoted a sense of guardianship of the organization and its progenitors (Davis, Schoorman, & Donaldson, 1997). These encounters motivated current members not to deviate from acceptable performance or organizational values.

TABLE 3
Institutionalizing the Leader: Additional Evidence

Leader	Herb Upton (<i>Malloy</i>)	Martin “Marty” Edwards (<i>Edwards Brothers</i>)
Institutionalizing the leader	<p>Associative learning</p> <ul style="list-style-type: none"> • “His sons ... they look just like him, Bill especially. And the big pine tree out front reminds me of Herb. They planted that out in front of his office and it has been here since the plant has been here. So that reminds me of Herb.” (20, M) • “Darn near everything in here [reminds me of Herb] ... the building, the boilers. It all came from, I used to call him, the man in the corner. I mean, as I referred to Herb sometimes.” (9, M) <p>Perpetuated practices</p> <ul style="list-style-type: none"> • “[Herb] doesn’t buy new cars. He didn’t want to have that image of being above you and I think Bill is like that too.” (9, M) • “When Herb stepped back and Bill became president, there was no change in leadership style.” (11, M) • “[Executives have] always listened and you could tell they are thinking about it, and they talk to you.” (6, M) <p>Physical memory work</p> <ul style="list-style-type: none"> • “One thing that makes you think of Herb is his office, he has his own special office that actually still to this day, you know he’s not really in here very much at all anymore you know he’s retired, but it still remains his office, no one touches it.” (13, M) • “Nobody will ever take Herb’s [parking] spot ... even the vendors that would show up, they wouldn’t even park there.” (9, M) • “There’s a sales, or a tracking report, where we keep track of the work that’s logged daily. You can pull that report up and its updated with information ... that is the ‘Super Herb.’” (10, M) 	<p>Associative learning</p> <ul style="list-style-type: none"> • “I would always see [Marty], you know, just about every day, walking around the plant. And that is something that John does too. I see him almost every day. You know, he will wave or something. Which is cool. That is one thing that I remember. I guess when I see John, I think of Marty, because he did that.” (31, EB) <p>Perpetuated practices</p> <ul style="list-style-type: none"> • “John does right around Christmas time, a luncheon for the 25 years and up people, and he talks about what’s been going on, and where we are at, and the issues that he has to deal with. So, he is good about that, and Marty was too.” (24, EB) • “And when Marty got older, John took over, and it seems like he does the same thing. He’s got an open-door policy, which if you want to talk to him, he’s trying to build the company but still be [a] hands-on type of owner, where if you want to talk you can.” (28, EB) <p>Physical memory work</p> <ul style="list-style-type: none"> • “Marty is all around. He and his wife died and they planted a tree out there so it is always here, and he always wanted the yard kept nice, better than it is now. He definitely built a pretty nice building here. ... Marty’s legacy is on the walls now.” (28, EB) • “[Marty and his wife] passed away so close together, the employees actually came to me and said, ‘this is what we want to do.’ They put together a book of memories and they did all of it! Had the plaque created with a nice memory inscribed ... and then they went and purchased a flowering tree to represent the strength of a tree which was Marty, but the softness of the flower, which was [his wife].” (32, EB)

As such, we came to classify these as *safeguarding encounters*.

At Edwards Brothers, Marty was summoned by current executives to help John Edwards feel accountable for important decisions. As previously noted, Marty’s decision-making style was characterized as “slow” and “disciplined,” “polish this apple and sharpen the saw and we’re going to keep doing what we’re doing” (30, EB). His son John’s style was described as more “forward-looking,” less concerned with “getting bogged down in the details,” and “more of a salesman, entrepreneur” (36, EB). Given these differences, Marty’s ghost was often summoned when John decided to “go on the edge here” or “when John is kind of hanging out there, taking that risk” (32, EB). Phases like, “your dad would kill you,” “your dad’s

spinning in his grave” (30, EB), “Marty would be rolling in his grave right now if he knew we were doing this ... Marty never would have done that” (32, EB), or “Marty never would have allowed this” (40, EB) summoned Marty to John’s mind to help him feel accountable for his decisions. According to Marty’s son Jim:

It’s contrasting John’s management style, because John is much more of a “feeling” or “sensory” guy, it just feels right, let’s just do the decision ... My dad would *never* make a decision like that, ever. Even if it slowed things down and he missed an opportunity, he wouldn’t do it that way. He was *so* disciplined ... that’s good for John and John needs that. (30, EB)

Notice Jim imagining Marty approaching a similar decision (“[he] would never make a decision like

TABLE 4
Activating Organizational Ghosts: Additional Evidence

	Summoning	Appearances
Activating organizational ghosts	<ul style="list-style-type: none"> • “Like I said, they say, ‘Marty would never do that’ and John is jumping over ... saying ‘Hold the net for me!’” (32, EB) • “He is Edwards Brothers I think to a lot of people. I think that’s why because they’ll say, ‘Well Marty would’ve never [made] the decisions that John’s making,’ but I think John is doing a good job. I think John is just different.” (40, EB) 	<ul style="list-style-type: none"> • “Sometimes when something is done, you think about how Herb would’ve done it, if it’s the assembly how Herb would have done it. And some of the things we have here, you’d think of Herb because he was here and president when that happened. When you see Bill you think of Herb ... sometimes he just pops up in your mind and you talk about it. Or you’re talking about something like the company and he just comes into the picture.” (6, M) • “Because when people—if your parents passed—they’ll ask you ‘Who do you think about?’ and ‘Do they talk to you?’ and interestingly, mine did. My dad [Marty] [did] a little bit.” (30, EB) • “When you are doing things here, I guess Herb is always on the floor.” (5, M)

that”), and viewing this contrast as “good” and “need[ed]” by John. Another executive said:

It’s like we’re a little nervous with John here, because we have had the majority of our career under Marty’s reign and that different style, and having John even though John has been around for a while, still he is so different. And when things do not go as planned, of course, “he should be more like his dad,” you hear those kind of comments. (32, EB)

One employee described the influence these reminders could potentially have on John:

If I’m John Edwards and I’m looking at that timeline, and I’m seeing my face as the leader here, and I’m looking behind me, I’m looking at every one of those guys thinking “I don’t want to let you down” ... They all did it and they took care of the employees and they had ups and downs, I’m sure. I would imagine if I was running this place, I would look at this timeline as a reminder of my forefathers looking down at me, watching me. (38, EB)

Note the implied encounter between John and Marty (and other progenitors) and the sense of accountability (not “letting them down”; “taking care of employees”) these encounters were intended to produce. John described the appearance and summoning of Marty in this way:

That picture on the wall, you’ve seen the timeline, which is outdated. I think for the financial people his ghost is in the hallway. “What would he do? He would hate this. Your dad would have hated this. This would have made your dad crazy,” I hear that stuff a lot. To me, his ghost is in the hallway ... there’s ghosts in the hallway all the time ... I’m in the office my grandfather, uncle, and dad were in. I guess part

of it is “don’t screw this up.” Don’t be the one on watch when this goes down. That’s a pretty powerful motivator. (42, EB)

These encounters with Marty’s ghost, caused by deliberate summonings and organic appearances, created comparisons that guarded the organization by fostering a sense of accountability to progenitors and reminding John of his duty to protect the organization and its stakeholders.

Similarly, safeguarding encounters with Herb fostered accountability and motivated behaviors aligned with Malloy’s values and identity. One employee said:

When I’m working and we are making the product—because [Herb] always said we have to produce a good-looking product. That always stuck with me, and I always try to do the best I can ... I try to make it in a way that it looks good because that is what Herb wants. So I always go with that feeling to try to always do the best job that you can. Don’t try to do things half-assed. Just be the best you can be. Sometimes not everything can be top-notch but at least try. That is what Herb always said, “You give more you are going to get more, you give less you are going to get less,” you know? (19, M)

In this example, Herb appeared in the present reminding the employee to make a quality product. Herb was imagined as the person the employee was making the product for, and the person who would ultimately approve of his performance. Actual phrases from Herb remembered in the present provided the guiding principles for this individual’s behavior. Another employee said:

Whatever I do, I try to do the best that I can because I try to remember who I’m representing ... I don’t want

TABLE 5
Imagined Encounters with Ghosts: Additional Evidence

Types of imagined encounters with organizational ghosts

Safeguarding encounters

- “I’m conscious that in key ways I don’t measure up. Herb is very conscientious about walking around the plant every day, seeing everybody. I don’t do that. I get up pretty sporadically, there’s long stretches where I’m not there. It’s my personal issue, not Herb’s. It’s a good thing the bar is set so high. I think he set a good example for me. He brought me to the management team pretty early on, and I think I had to be a real pain in the neck. ... I think he created a very participatory decision-making process, which is helpful. I’m really comfortable with that.” (4, M)
- “I do sometimes feel a little bad for [John] because I do think people hold him to a standard that ... it’s not that I don’t think he could get to that standard, I just don’t think it’s his personality. I mean we’re in a new era and it’s not that we can’t remember the past, but 40 years from now we could be getting the ‘warm and fuzzies’ from a picture of John, just like we are from Marty. But I do feel bad sometimes because I do think people hold him to a higher standard than he would have had to have been had these two not been so well-remembered. Had they been like evil, they would be like ‘I’m so happy John’s here now!’” (40, EB)
- “In my personal life, I think Bill and Herb have definitely influenced me in the way I behave outside the shop. There’s no doubt about it, like what would Bill do or what would Herb do type of thing. I’ve been raised here, type of thing.” (3, M)
- “People still do things kind of above and beyond the normal call of duty because they are trying to take care of their customer and I think that comes from the influence that herb had.” (18, M)
- “I think that everybody respected [Herb]. Everybody who has ever had any much of a connection to him at all has that same feeling. It makes you work that much harder for him.” (5, M)
- Interviewer: “How do these reminders of Herb affect you?”
 Informant: “I think when somebody is treated with great consideration and respect, they start realizing that’s probably the way I oughta act toward others because that makes me feel good. And so I think that builds on itself.” (M, 10)

Comforting Encounters

- “You can go sit under that tree, or walk by it and say ... ‘Marty was a pretty awesome president-CEO.’ ... I don’t really know why [we use timelines, yearbooks, etc.], but I do know we do it quite often ... we will bring that yearbook out when we can’t remember someone’s name or what they looked like and then we’ll just start telling stories about people or folks who are retiring, too ... it’s the same as looking through photo albums of your family. It just makes you remember where you came from and feel good about where you are now.” (40, EB)
- “How do these reminders of Herb affect you? I think having a good place to work and giving people pride in what they do, it’s important to give them the feeling that they’re a part of a worthwhile organization. It’s really instilling pride in the organization.” (4, M)
- “I trust John’s leadership. John’s father and his uncle, Joe and Marty Edwards, they pretty much put [Edwards Brothers] on the map just like Herb, and Bill and Joe and them have done here. Those guys know how to do those kind of things.” (22, M)
- “I feel very comfortable ... He has listened to some reports from Bill or maybe Herb. I thought it was kind of funny because I was talking to Herb early on after the merger. He said ‘So how is it going?’ I said ‘We are all a little bit worried about security’ and he said ‘[James] you don’t have anything to worry about.’ Herb you need to live forever because he is the one that is making it happen!” (5, M)

Devaluing encounters

- “I know when he cut our wages, he was upset about it. Someone cornered me one time and they said they could probably guarantee that Bill probably will take the wage cut. John Edwards will not take the wage cut. But Bill would and so would of Herb. Cause it is good for the goose, it is good for the gander. And that is their thinking too.” (8, M)
- “I think John was walking through the plant and he said ‘dammit’ in a light way, not in an angry way, but had a swear word. I forget the swear word that he had, ‘ass’ or something and I had several complaints. And John went ‘I don’t even remember saying it!’ But just you know they expect the leader to be like Herb.” (32, EB)
- “Just conversations with people that have been here a long time, hearing about how it used to be ... no matter where you’re at it seems like it always used to be cooler, no matter what you’re doing. I hear a lot from the other guys, ‘oh man, when Marty was running the place ...’” (38, EB)
- “Nothing against Bill, but I felt Herb was more employee-centered, and more concerned with our well-being. Bill is more bottom-line, what helps the company more than ... I’m not saying he throws us under the bus per say, but we didn’t feel the concern that we felt with Herb.” (20, M)

TABLE 5
(Continued)

-
- “You know the Herb Posters originated, you know if we had a profitable month, Herb was smiling. You know, they changed his head on this stand up, and if it wasn’t so good, Herb didn’t have a frown but he wasn’t so happy. He didn’t have a happy look on his face. It wasn’t like a ‘get to work’ type of face. There’s never been any of that. But I’m hoping that we can. But I don’t know what people at Jackson road would feel about putting John Edwards’s face on there. I’m not sure that would go over so well.” (3, M)
 - “Herb and Bill, they want to be liked. They truly want to be friends with people they work with, they want to be equals. They want people to feel good about working there. John wants people to feel good. He’s going to do his best to make them feel good, but if they don’t, screw it. That’s been a struggle. It’s a struggle both ways.” (11, M)
 - “Herb and Bill are not quick decision-makers ... Whereas John Edwards shoots from the hip. He’ll make a decision right now.” (14, M)
-

to think that I’ve put [Herb] on a pedestal. I think of him a lot like I would my father. I want him to be proud of what I do. (9, M)

Here, Herb appeared as a father figure who provided approval of this employee’s work. This safeguarding encounter prompted comparisons to evaluate whether Herb would be proud of the employee’s actions. This desire to “please” Herb even though he was gone may have evolved from the Herb Posters described earlier that reinforced organizational performance. This summoning of Herb created opportunities for ghostly appearances 15 years after his departure, prompting comparisons that motivated a level of performance that would make Herb “proud.”

Type 2: Comforting encounters. In safeguarding encounters, comparing one’s thoughts or actions with Herb’s or Marty’s previous or imagined thoughts or actions inspired accountability and stewardship. In what we call *comforting encounters*, individuals felt security and comfort when current actions seen as aligned with Herb’s or Marty’s remembered or imagined actions. Comforting encounters were most noticeable when Marty and Herb were summoned after the merger was announced. John Edwards and Bill Upton created and distributed a newsletter to employees immediately after the announcement, including facts about both companies and a picture of the new management team. The newsletter concluded with images and quotes from Marty and Herb, including a letter written by Marty in the 1980s. Next to Herb’s image, in bold letters, it said, “I think it’s the right move” and “The merger will bring some change; people should try to pull together and make things work. They should not think of themselves as Malloy people or Edwards Brothers people, but as being all on one team now” (Appendix A). Next to Marty’s image was his “philosophy of working together.” He encouraged teamwork, and said “Winning customers,

satisfying them, and earning more of their business” is “the name of the game.” The newsletter ended with pictures of John Edwards and Bill Upton and the phrase, “Together the families open a new chapter in the book printing industry as Edwards Brothers and Malloy.”

The encounters fostered by this summoning of Marty and Herb had a powerful impact on initial reactions to the merger. For example, an Edwards Brothers employee said: “As I was reading that, I just felt really good about it cause you know, these guys are still, even though maybe they are not in my mind every day, they are in the minds of their sons” (31, EB). This individual felt “really good” as Marty and Herb were “in the minds of their sons,” having ghostly encounters as they pursued this decision. Another employee said, “I do believe that seeing his image makes us feel like warm and fuzzy inside, like everything’s going to be okay. I think his image means more to people than John’s” (40, EB). Further, Marty’s image provoked a strong sense of security. One executive noted: “We have their blessing. That’s important for people to know ... We have their blessing. They’re the adults in the room that said, ‘This is okay.’ Even though he’s not there, he would like this” (30, EB). Note the inference that Marty and Herb were “in the room” as the decision was made. The imagined “blessing” of Herb and Marty endowed this decision with legitimacy and eased employee fears. One employee noted: “People have affections and they have memories and they know what Marty and Herb were trying to build. If you didn’t have John and Bill respecting that, you would lose the loyalty” (41, EB). Thus, in these comforting encounters individuals felt a palpable sense of reassurance that the decision to merge was aligned with Herb’s or Marty’s remembered or imagined actions

Type 3: Devaluing encounters. Finally, the merger illuminated what we call *devaluing encounters*, where Herb or Marty were used to disparage the value system of other organizations or leaders. Unlike comforting encounters, where perceived alignment with the values of Herb or Marty brought comfort, devaluing encounters highlighted concerning departures from the values of Herb or Marty. These discrepancies were used to assert the superiority of Herb's or Marty's values and criticize other organizations or leaders.

At Edwards Brothers, we saw some employees and executives diminish the values of Herb Upton, usually in response to complaints they heard about the merger from Malloy employees. In devaluing encounters, Marty was often "summoned" to help assert the superiority of the Edwards Brothers value system. For example, one Edwards Brothers employee characterized Herb as a "Mr. Rogers" who knew his employees but lacked Marty's business acumen (32, EB). In describing how they imagined Herb and Marty would have approached the merger, one executive said, "All Herb cares about is the people are okay, they are taken care of. Marty cares about 'let's get efficiencies in the system. Let's run it, let's work it'" (30, EB). This same executive contrasted John's approach to employee complaints with the approach he imagined Herb might take:

John's response would be "Get out!" and Herb would say, "Let's talk about it." Very different approach to the same thing. John's is an efficiency thing, "You're not with me, you're against me, so get out!" And Herb's is, "What else is going on in your life that we need to talk about?" I'm like John here, you know, "Get out! I don't need to hear about your belly ache, go!" Which to me, one part of me says that inefficiency and need to dig in is a weakness ... we don't have that gene. (30, EB)

Notice how Herb's imagined approach ("Let's talk about it") was compared with Marty's imagined approach and John's approach, and Herb's approach was labeled as inefficient and a "weakness." Thus, for Edwards Brothers employees, imagined or remembered encounters between Herb and Marty and Herb and John served to elevate the Edwards Brothers's value of "efficiency" embodied by Marty, and diminish the "family"-centered values and identity at Malloy embodied by Herb.

In contrast, at Malloy, ghostly encounters with Herb served to devalue John Edwards and the values and identity of Edwards Brothers. While some employees supported the merger, some offered restrained criticism and even disdain of John and his

leadership. Our analysis revealed that comparisons between Herb's remembered or imagined approach and John Edwards's approach emerged among those who were upset about the merger. A Malloy employee said:

Herb knew my name the day after I started here. John Edwards will never know my name. Maybe it seems insignificant, but it tells me a lot. Now, John Edwards has more people that he has to deal with, but I don't care. Herb would have dealt with it. (8, M)

This quote couples a remembered encounter with Herb ("Herb knew my name the day after I started here") and uses this memory to imagine what Herb would have done if he were in John's shoes in the present ("Herb would have dealt with it"). It shows that Herb's perceived care for others was the standard against which John was being judged, and the prediction that an imagined Herb would have "dealt with" learning the names of a much larger group of employees served as justification for devaluing John's leadership approach. A Malloy employee in the manufacturing process described John's first meeting with Malloy employees after the merger announcement as follows:

John didn't endear himself when he introduced himself to us and started making arrogant remarks about Bill. He is not like Bill or Herb whatsoever. His comments were ... insulting, demeaning, and showed me his character. And I remember saying something to Bill about it a couple of days later, and Bill goes, "Well, you have to understand John." And I said, "Well, what I understand is, arrogant guy that wants to make you look like shit." (8, M)

Notice that Herb was not physically present, yet he was the leader who "appeared" and to whom John was compared. The perceived discrepancy between John and Herb justified this employee's disdain of John. It is interesting to note that John was viewed as great by people at Edwards Brothers, but the act of knowing names was valued at Malloy. By remembering previous episodes with Herb, and using those memories to simulate Herb's actions in the present, Malloy employees diminished the values of Edwards Brothers and relegated John as a second-class leader.

The Persistence or Death of Ghosts

As seen in Figure 1, the institutionalization and activation of ghosts sits at a critical point in the model. Sandelands (2003: 9) argued, "a social form is visible with continuous activity. Like the waterfall, it

ceases to exist the moment its supply of activity is cut off." Through associative learning, perpetuated practices, and physical memory work, these ghosts remained "alive," while others (e.g., founder Jim Malloy) faded. If institutionalization is limited or if activation stops, ghostly encounters can cease and lose their influence. A Malloy employee said, "there's always a fear that [Malloy's way of being] might not continue ... as long as there are people who want it to continue and try to keep it going ... there will always be some of that" (6, M). Another said:

And as long as the current employees are alive, a little bit of Herb's legacy will be alive because all of us carry part of Herb's legacy inside of us because he's passed it on to us. The thing that I'm concerned about, and really Bill is a lot the same way. He's carried on a lot of the traditions of his dad. He's very concerned about employees, sometimes to a fault. And I think one of the big concerns that I have is that as time goes on with this merger, that we are going to lose a lot of that. And we've already lost a lot. (1, M)

An Edwards Brothers employee also noted the fragility of Marty and Herb's ghosts:

You still have a mass of people here that know Marty, a mass of people that know Herb. Now, if it was all 20-year-olds working here that maybe saw him once, it probably wouldn't have made a difference. But you have folks here that remember them and as loyal as they are learning to be to John and Bill, their loyalties are stronger to Herb and Marty. (41, EB)

These quotes suggest that organizational ghosts are not guaranteed to perpetuate, and can "die" over time. When people cease talking about an individual, individual memories may endure for a time, and physical artifacts may endure indefinitely, but the ghost's influence in the organization is lost. To keep ghosts alive, our data suggest that there must be a group of people who "want" the ghost to continue and "try" to keep the influence of the ghost going by activating the ghost through intentional and organic forms of memory work. It appears that there must also be loyalty to and confidence in the ghost as the prototype of the organization's values and identity. As long as this loyalty exists, current employees will view themselves as stewards aligned with the objectives of their principal leader (i.e., the ghost; Davis et al., 1997). This loyalty and stewardship may fade over time as fewer people in the organization have a direct connection to the ghost. In some cases, new organizational regimes may intentionally seek to destroy such loyalty. For example, in ancient Rome, *damnatio memoriae* (i.e., condemnation of memory)

involved erasing overthrown leaders from history by mutilating or defacing their images or monuments (Varner, 2004). However, this loyalty may be reignited after periods of obscurity, as Jansen (2007) showed how the "Sandinistas" were able to "resurrect" the memory of forgotten leader Augusto Sandisto after his name and image were publicly censored after his death. Thus, the influence of ghosts depends on a group of loyal followers who want the ghost to continue and are willing to work to keep it alive.

DISCUSSION

Scholars have long noted the importance of leadership in groups and the impact of leader group prototypicality on leader influence. In this study, we develop a model that explains how some leaders become the ideal prototype in their group and cultivate influence that endures after their exit. Our findings show that leaders with extensive exposure who are perceived as exceptionally competent and warm elicit admiration and adoration. When viewed as the creators of the organization's success, values, and identity, they become the ideal prototype and qualify to become organizational ghosts. We further show how these ghosts are institutionalized through associative learning, perpetuated practices, and physical memory work. This institutionalization facilitates the summoning or appearance of these ghosts, and ghostly encounters (remembered or imagined) perpetuate their influence on remaining organizational members. In this section, we discuss our theoretical contributions, study limitations, and directions for future research.

Theoretical Contributions

Our study makes several contributions to organizational studies. First, leadership research (Bass & Bass, 2009; Bingham et al., 2014; Van Knippenberg, 2011) has largely focused on explaining the emergence and effectiveness of *current* leaders in social groups. However, this study examines the influence of *former* leaders in social groups, and the important historical forces that shape a leader's emergence and effectiveness. When former leaders become group prototypes, they become a critical reference point that influences how current leaders and members make and respond to important organizational decisions. This theoretical pivot calls for scholars to consider "the role of the past" in organizations (De Massis, Frattini, Kotlar, Petruzzelli, & Wright, 2016: 95), focusing more explicitly on what has often been unseen in

leadership research—namely, how the leaders that came before may influence the actions and effectiveness of current leaders.

Second, the social identity theory of leadership views leader group prototypicality as critical to the influence of current leaders in social groups. Our work adds two important insights to this literature. First, we move from more abstract conceptions of leader group prototypicality to show how specific leaders can emerge as the group prototype against which other leaders are judged, and highlight key characteristics of leaders that may play an important role in this process: exposure, admiration and adoration, and ultimately being seen as the primary creator of the organization's values, identity, and performance. By better understanding how former leaders emerge as group prototypes, we can begin to understand the dynamics that shape who in an organization might gain influence that persists after they are gone, including how nonfounders might supplant founders. Second, we highlight the implications this has for future judgments about leader group prototypicality, showing how future generations of leaders are then compared to former leaders. This suggests that judgments of leader group prototypicality emerge and are laden with more historical context and significance than previously considered.

Third, scholars have often argued that the desire to create a legacy motivates current leaders (Wade-Benzoni et al., 2010), and numerous literatures—such as those on imprinting (Marquis & Tilcsik, 2013), socialization (Saks & Ashforth, 1997), succession (Hambrick, 2007), cultural and institutional leadership (Schein, 2010; Selznick, 1957; Kraatz, 2009; Washington, Boal & Davis, 2008), collective memory (Olick & Robbins, 1998), and family firms (Aronoff, 2004)—have shown that former leaders, especially founders, can establish an enduring influence (e.g., Basque & Langley, 2018; Fauchart & Gruber, 2011; Ogbonna & Harris, 2001). However, this work has often neglected nonfounders, and overlooked the “problem of reception” (Hirst & Manier, 2008: 192), leaving us with an inadequate understanding of how individuals “consume” or interact with legacies that are left behind. As Colquitt et al. (2023: 24) recently articulated, this is problematic because “organizations contain more legatees than legators” and “those legatees... determine whether the legator's contributions” endure. Our work unpacks group prototypicality and the cognitive interplay between former leaders and current members as a key mechanism that enables leader legacies. We show how organic and intentional forms of

memory work catalyze ghostly encounters (remembered and imagined) and influential comparisons between past and present actions.

Moreover, while other disciplines have recognized the significance of imagined encounters with others not in the immediate social context (Crisp & Turner, 2009; Honeycutt & McCann, 2017; Rosenblatt & Meyer, 1986), the role that these encounters might play in organizations remains overlooked. As such, we build on recent work in organizational studies that has introduced the importance of imagined activity (e.g., Meleady & Crisp, 2017; Obodaru, 2017; Schinoff & Byron, 2022) by expanding our understanding of how ghostly encounters enable leadership influence to transcend tenure in an organization. For example, Obodaru (2017) noted how imagining hypothetical selves on alternate career paths might shape career decisions and attitudes. Schinoff and Byron (2022) theorized that imagined interactions can help people feel more connected and gain confidence to influence others. Building on this work, we show how ghostly encounters protect organizations from poor decision-making or performance, provide legitimacy for organizational decisions, or criticize and subordinate the values of other leaders and organizations. These ghostly encounters act as a mechanism of informal control, encouraging agents to act in the interests of the group (Cardinal, Sitkin, & Long, 2004), and are also significant in redefining group values and boundaries when they are contested. Thus, we highlight the critical role that ghostly encounters may play in organizational decision-making, team dynamics, and organizational change.

Finally, we elaborate on Gergen's (2000) notion of “social ghosts”—real or imagined individuals from the past with whom individuals mentally engage—by showing that organizational ghosts have the ability to influence group behavior in ways that transcend the personal influence of social ghosts. As they have come to represent the values and identity of a social group, they are not simply a role model for others to follow, but embody a framework for defining morality, making decisions, and navigating ambiguity and change. Thus, introducing the concept of organizational ghosts to organizational studies heightens our ability to see and examine historical group forces that may subtly but powerfully influence organizational behavior.

Limitations and Future Directions

This study has several limitations that offer opportunities for future research. First, the context of our

study was two multigenerational family businesses. We believe that the ghostly encounters we examined are common in most organizations, but they may be even more pronounced and influential in family firms. As noted by Jaffe and Lane (2004: 98), many family firms “have a set of values that underlie their diverse business and philanthropic activities.” According to Aronoff (2004: 57), as family firms progress they “typically hope to benefit financially by sharing in family wealth, but they are often primarily motivated by their sense of belonging in a group that possesses the uniquely meaningful opportunity to sustain and extend a legacy of values.” Thus, while we believe ghostly encounters are likely to occur in many organizational contexts, they may be more critical in the maintenance and perpetuation of values that are central to family firms. Future research should consider examining such encounters in other types of organizations.

Second, as the family businesses we studied were relatively small, it seems critical to examine the emergence of ghosts in more complex contexts (e.g., size, geographic dispersion, international expansion, etc.). Perhaps in large or dispersed contexts, ghosts emerge and exert more influence in subgroups. The organizations we studied were also older family businesses with long-tenured employees. Though not measured, organizational identification appeared high, and the group identity salient. Past research has shown that group prototypes are more important for leader evaluations when the salience of group membership is high, and more abstract implicit leader schemas are more important comparators when group membership salience is lower (Hogg, Hains, & Mason, 1998; Lord & Brown, 2004; Lord et al., 1984). Thus, we believe that ghostly encounters may be more common in family businesses, older organizations, or those with a more experienced workforce. The merger also may have made it easier to detect imagined encounters as current members dealt with feelings of organizational loss or bereavement (Bell & Taylor, 2011; Crosina & Pratt, 2019). It would be useful to explore whether and how ghosts emerge in times of stability.

Third, we were not able to observe Herb and Marty during their tenures, so our findings about why Herb and Marty became group prototypes are based on historical accounts. Based on our immersion in the context, the emergence of these two organizational ghosts appeared organic with low intentionality. In contrast, Steve Jobs intentionally invested significant effort to preserve his memory and influence at Apple (Gurman, 2012). It seems likely that organic

versus intentional ghosts might have different characteristics and influence, particularly if a given leader is seen as trying to ensure their influence selfishly or without merit. Thus, future work might consider using longitudinal approaches to study leaders prior to their exit (i.e., “ghosts in the making”), and examine the initial emergence of their ghostly influence after they leave. Future research might also use more longitudinal methods to examine the ghostly influence of leaders after their departure to uncover other important outcomes affected by organizational ghosts, such as the influence of ghosts across organizational boundaries. For example, Jack Welch, the former CEO of GE, inspired an entire school of thought about leadership and business management that was then transported to other organizations, such as Home Depot and Boeing, via his surrogates (Gelles, 2022).

Fourth, our findings suggest that Herb and Marty came to be admired and adored because they were seen as outliers on the primary social judgments of competence and warmth. Prior work has suggested that judgments of warmth may be weighted more than judgments of competence. Our findings support this idea, as the intensity of Herb’s influence appeared stronger than that of Marty’s. Yet, it may also be the case that extreme competence could compensate for a lack of warmth. For example, Steve Jobs was not known as warm (Isaacson, 2012), yet his perceived competence may have rendered this deficit inconsequential. In addition, expected perceptions of competence and warmth could vary by context. Future work could examine the interplay of these social judgments, while also examining other important social judgments that could lead to admiration and adoration.

Fifth, we did not intend to study organizational ghosts (Locke, 2001), so future work might examine different types of ghosts beyond those we found. For example, one leader was cited by informants for his negative management style and subsequent firing, but we found no evidence that members had ghostly encounters with him. Do current members have ghostly encounters with former members seen as negative? It may also be that new employees are influenced by ghosts from a previous employer, or professionals might be influenced by ghosts of their professions. In addition, the two ghosts in our data were male, and we do not have the ability to examine how this process might differ for leaders of other demographic variables (e.g., gender, race). Thus, future work should explore different types of ghosts that may emerge in organizations.

Sixth, while we identified two ways in which ghosts are activated to influence current organizational

members (summoning and appearances), our informants did not specify which type of activation is more effective. Future research could consider the effectiveness of intentional activation of organizational ghosts, and the qualities or characteristics of such activations that might elicit influential encounters. Researchers might also consider how connection and activation might be possible for organizational members that did not know a former leader; literature on depersonalized trust might lend key insights to this process (Brewer, 2008). Ghostly encounters may also have other functions that we did not observe. For example, we found that remembered and imagined encounters with Marty promoted conservative decision-making at Edwards Brothers, but ghostly encounters might promote risk-taking or innovation in other contexts. While Herb and Marty appeared to be summoned in sincere, helpful ways, leaders might manipulate followers by using ghosts to create the perception of continuity while supplanting a former leader's values. For example, Herb's ghost was a blessing and a curse for the merger, as ghostly encounters with Herb fostered comfort after the initial decision but justified opposition as the merger played out.

CONCLUSION

Leadership scholars have long understood that leader group prototypicality strengthens leadership influence during a leader's tenure. Other organizational scholars have assumed that leaders can have legacies that transcend their tenure. However, we have lacked a wholistic explanation of the origins of leader prototypicality and how it enables leaders to accrue influence that endures after organizational exit. This study presents the concept of organizational ghosts—former organizational members who become the prototype of a group's values and identity. As these ghosts are institutionalized in an organization, they can be activated and have ghostly encounters (remembered and imagined) with current members. These encounters prompt comparisons between the values and identities represented by the ghost and those represented by present actions or decisions. These comparisons serve to safeguard the organization, comfort organizational members, and diminish alternative value systems. We believe this work opens new avenues for future researchers to explore the significance of ghosts in organizations, and the important roles they may play through ghostly interactions despite not being physically present.

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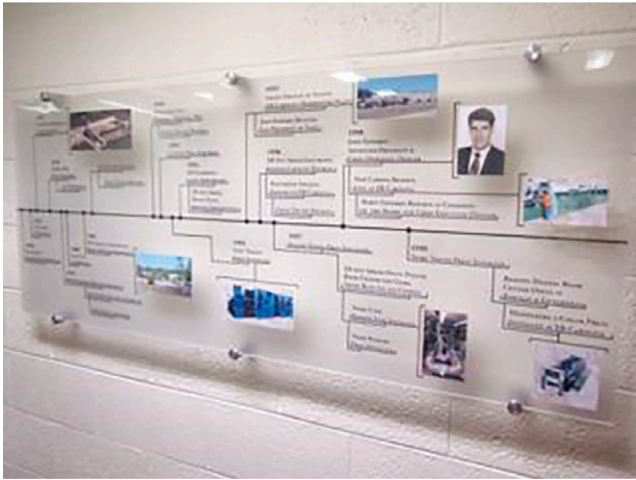
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**APPENDIX A
RELEVANT ARCHIVAL ARTIFACTS**

**FIGURE A1
Timeline at Edwards Brothers**



**FIGURE A2
Edwards Brothers Website (“History” Section)**



**FIGURE A3
Picture of Edwards Brothers CEOs (Marty Edwards on the Far Right)**



**FIGURE A4
Picture of a “Herb Poster” (Malloy)**

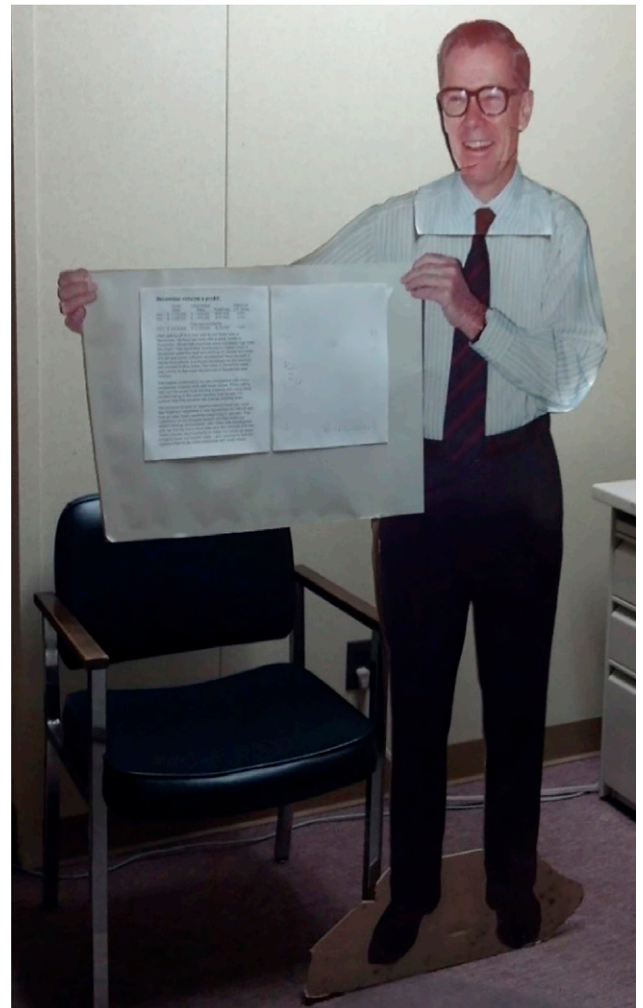


FIGURE A5
Tree, Plaque for Marty & Rosalie Edwards



FIGURE A6
Excerpt from EB-Malloy Newsletter Announcing the Merger

"I Think It's the Right Move"

A quote from Herb Upton above sums up his thoughts on the merger between the two book printing companies. Herb helped grow then Malloy Lithographing Inc. from 500,000 dollars per year in revenue to over 35 million today. According to Upton, they accomplished this with a very "can do" workforce of resourceful people who made it work. He offers his golden rules for running a business.

